

TRAVEL PRINTOUT



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U. S.
Travel
Data
Center



Research News for the U.S. Travel Industry

October 1986

Volume 15, Number 10

Travel Outlook Forum Examines Prospects for Coming Year

So far 1986 has been an uninspiring year for travel, concluded Dr. Douglas C. Frechtling, director of the US Travel Data Center, at the 1987 Travel Outlook Forum on October 10, 1986, in Miami, Florida.

"We all had high hopes for travel in America this year because the conditions were right for a travel boom," Frechtling noted during the twelfth annual forum, co-sponsored by the US Travel Data Center and by Travel and Tourism Research Association. The Data Center is an affiliate of Travel Industry Association of America.

Continuing economic expansion, lower gasoline prices, a slowing of consumer purchases of durable goods, and stable travel prices led the industry to expect more than the 2 percent increase in U.S. residents' travel measured in the first half of 1986 over the comparable period last year.

The Data Center's National Travel Survey indicates U.S. business/convention and shorter personal trips are up, while vacation travel, representing two-thirds of Americans' trips, has leveled for this year.

Although expansion in U.S. travel is anemic this year, the travel industry is growing more rapidly than last year and faster than the rest of the economy, said Frechtling.

A brief summary of travel trends presented at the forum includes:

o Air Travel: The industry had the first increase since 1983, but low air fares will remain, said Michael Derchin, vice-president of First Boston Corporation.

o Car Rental: According to William Vervaeke, staff vice president of the Hertz Corporation, 1986 was very profitable for car rentals.

o Theme and Amusement Parks: Park visitation increased since last year, with over 45 percent of the population visiting such facilities between March and September, said John Graff, executive director of the International Association of Amusement Parks and Attractions.

The complete edited proceedings of the twelfth annual Travel Outlook Forum will be printed in the 150 page 1987 Outlook For Travel and Tourism available in December 1986. Data Center members will receive a complimentary copy. Others may obtain a copy by sending \$85 (prepaid only) to the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, D.C. 20036.**

Most 1984 and earlier Data Center publications will be out of print after January 1, 1987.

The Data Center is offering a 20 percent discount until December 15, 1986, on 1984 and earlier volumes of the National Travel Survey, Travel Outlook Forum Proceedings, Survey of State Travel Offices and other economic studies.

Ida Simmons, communications manager for the US Travel Data Center said, "This will be the last opportunity for librarians and researchers to complete their series of Data Center publications before our current holdings are placed in an archive."

Place an order by using the order forms on the last two pages of the 1986 Guide to Membership, Publications and Programs.

Additional information and order forms are available from Mary Coleman (202) 293-1040. Orders will be filled before January 1, 1987.**

Travel Prices Fall Again in August

Declining gasoline prices in August contributed to the fifth decrease in travel prices this year. Travel prices fell 0.1 percent according to the Travel Price Index (TPI) compiled monthly by the US Travel Data Center.

For comparison, consumer goods costs, as measured by the Consumer Price Index (CPI), rose 0.2 percent in August to 328.6 (1967=100).

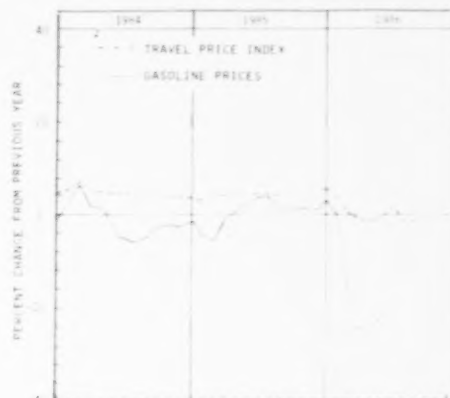
The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, fell to 380.1 (1967=100) in August.

Gasoline prices declined 5.2 percent in August, the second consecutive month in which gasoline prices have fallen by more than 5 percent. Airline and intercity train fares each fell 0.2 percent in August.

Lodging prices continued to rise in August, posting a gain of 1.9 percent, a common seasonal increase for this

category. The cost of incidentals grew 0.9 percent and intercity bus fares increased 0.7 percent.

Since August 1985, gasoline prices have declined 30.5 percent, triggering a 2.1 percent drop in the overall cost of travel for the same period. On the other hand, the CPI has increased 1.6 percent over the same twelve months.##



Falling Gasoline Prices Dampen Travel Price Index

Monthly and Annual Rates of Change in the Travel Price Index and Components August 1986

TPI Component	Monthly Percent Change	Annual Percent Change
	July 1986 to August 1986	August 1985 to August 1986
Transportation	- 1.9	-10.2
Airline Fares	- 0.2	4.5
Intercity Bus Fares	0.7	10.6
Intercity Train Fares	- 0.2	8.1
Taxicab Fares	0.4	3.2
Gasoline	- 5.2	-30.5
Lodging	1.9	3.0
Food Away From Home	0.3	3.8
Entertainment Services	0.1	5.0
Incidentals	0.9	1.6
TRAVEL PRICE INDEX	- 0.1	- 2.1
CONSUMER PRICE INDEX	0.2	1.6

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by an affiliate of Travel Industry Association of America, the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, NW, Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director, Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for \$55 per year, U.S., Canada and Mexico; other foreign countries, \$65 per year, payable in U.S. funds only.

Data Center Director Urges Federal Government to Conduct More Research on Travel

When Dr. Douglas C. Frechtling, director of the U.S. Travel Data Center, spoke before the U.S. Senate Subcommittee on Business, Trade, and Tourism in Washington, D.C., on September 22, 1986, he emphasized strengthening the federal role in travel and tourism data collection.

Frechtling explained that the role of the Data Center is to develop programs detailing the economic impact of travel and tourism and the course of travel markets.

Although the Data Center developed its National Travel Survey and utilized private sector sources for data collection, nothing substitutes for large scale periodic surveys by the Census Bureau.

Dr. Frechtling stressed the federal government's unique position in gathering travel related data because of its ability to promote response, maintain confidentiality, and underwrite the high cost of publicly available data.

To this end, the Data Center, the Travel Industry Association of America and other travel industry organizations

have aggressively sought improvement in federal data collection programs and have actively participated in design of the Census Bureau's 1977 and 1982 National Travel Surveys.

Frechtling recommended the swift reinstitution of the quinquennial National Travel Survey and the addition of several new sources of information.##

The Travel and Tourism Government Affairs Council will host the Fifth Annual Tourism Industry Unity Dinner and Congressional Reception on February 18, 1987, at the Washington Hilton Hotel.

The dinner will highlight a week of industry activity including the U.S. Travel and Tourism Administration's annual state/city and industry days.

Proceeds from the dinner, \$250 per person or \$2000 per table of ten, will be used to continue the council's issue research and policy analysis.

For further information contact: Travel and Tourism Government Affairs Council, 1899 L Street NW, Washington, D.C. 20036, Jim Gaffigan (202) 293-5407.##

Visitor Volume at National Parks

Region	JUL 1986 visits*	Change from JUL 1985 (percent)	Percent change 1986/1985 Year-to-Date
NEW ENGLAND	2,174,767	-5.0	1.8
MIDDLE ATLANTIC	5,357,635	6.4	12.1
SOUTH EAST	17,484,702	5.5	8.3
EAST NORTH CENTRAL	1,016,116	-2.8	-3.2
WEST NORTH CENTRAL	2,096,455	-.3	1.3
WEST SOUTH CENTRAL	1,362,779	1.6	4.9
MOUNTAIN	6,615,249	9.0	8.9
PACIFIC	6,875,430	16.2	9.6
TOTAL	42,983,133	6.5	8.2

* adjusted for differences in reporting units

The U.S. Travel Data Center is an affiliate of the Travel Industry Association of America



States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

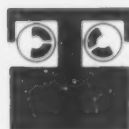
CURRENT TRAVEL INDICATORS

CURRENT TRAVEL INDICATORS		Current Month	Current Value	Percent Change		
				From Previous Month	From Year-ago Month	Year-to-date 1986/85
<u>Establishment receipts or retail sales</u>						
Hotels, motels and other lodging places(1)	Jul	\$ 3,905 million	3.8	6.0	6.3	
Eating and drinking places(2)	Jul	\$11,802 million	0.7	7.9	6.6	
Gasoline service stations(2)	Jul	\$ 6,951 million	-2.7	-18.5	-10.3	
<u>Commercial lodging demand</u>						
Hotel/motel occupancy rate(3)	Jul	68.6 percent	3.9	2.0	0.4	
Real demand for commercial lodging(4)	Jul	57.8 million	1.3	7.9	3.3	
<u>Airline passenger traffic(5)</u>						
Domestic revenue passenger-miles	Jul	23.7 billion	7.5	11.8	12.2	
International revenue passenger-miles	Jul	6.6 billion	14.9	-6.4	-11.4	
<u>Highway traffic volume(6)</u>						
Rural arterial vehicle-miles	Jul	45.8 billion	6.5	4.6	5.5	
<u>Rail passenger traffic(7)</u>						
Amtrak passenger-miles	Jul	531.8 million	6.7	0.2	1.2	
<u>Travel Price Index(8)</u>						
	Jul	380.3	0.2	1.6	0.7	
<u>U.S. resident travel(9)</u>						
Total person-trips	Jun	113.1 million	13.0	0.7	2.2	
Vacation person-trips	Jun	80.8 million	23.9	-3.0	-1.9	
Total person-nights	Jun	622.1 million	38.1	0.7	0.0	
Vacation person-nights	Jun	492.9 million	54.3	2.0	-0.4	
<u>Public use of national parks(10)</u>						
Visits	Jul	43,328,337	25.4	4.1	6.7	
Overnight stays	Jul	3,135,182	38.0	-2.4	-0.6	
<u>Foreign arrivals in U.S.(11)</u>						
From overseas	Jul	1,087,834	29.2	24.8	14.2	
From Canada	Jul	1,452,523	67.4	-4.6	-0.6	
From Mexico	Jul	107,369	89.6	-20.2	-18.2	
<u>U.S. citizen departures(11)</u>						
To overseas	Jul	1,407,961	2.1	-15.4	-8.4	
To Canada	Jul	2,757,525	48.8	18.7	16.9	
<u>Domestic demand for motor gasoline(12)</u>						
Barrels per day	Jul	7,512 thousand	4.3	7.4	2.7	

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Hettleton Research Center. (13) Preliminary; Source: U.S. Department of Energy.

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November 1986

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1986 Summer Vacation Travel increases 4 percent

Summer vacation travel in 1986 increased 4 percent over 1985 levels, and Americans covered nearly 260 billion miles in the process, according to the latest results of the US Travel Data Center's National Travel Survey.

June, July and August proved, as the Data Center predicted last spring, to be "the best summer for the travel industry since 1981"; however, the 285 million vacation person-trips recorded by the monthly telephone survey fell slightly short of the 5 percent increase forecast by the Data Center for the period. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The average duration of vacation trips rose slightly to 6.2 nights, and total nights away from home on summer

vacation match the Data Center's projected 4 percent increase. The average distance declined from 970 round-trip miles in 1985 to 950 this year.

Almost 83 percent of vacationers traveled by auto/truck/ RV, compared with 80 percent in 1985, and 15 percent traveled by airplane, compared with 16 percent the previous year. Of all vacationers, about 42 percent stayed in hotels and another 42 percent stayed with friends and relatives, almost unchanged from year-earlier figures.

The South Atlantic/East South Central regions attracted the greatest share of visitors, 31 percent, although the West North Central-West South Central regions showed the greatest increase in visitors.##

Program Advisory Council Reviews 1987 Projects

At its recent annual meeting in New York, the US Travel Data Center's Program Advisory Council recommended that monthly National Travel Survey data be cumulated and reported seasonally rather than quarterly, concluding that seasonal totals will be more useful to the industry.

Reports on the fall season would contain data on September, October, and November; winter would cover December, January, and February; and spring would comprise data on March, April, and May.

The council, comprised of representatives from each organization maintaining a full membership in the Data Center, reviews and recommends new projects for the coming year.

"While we can continue to provide some quarterly totals, our members may have difficulty adjusting to this new

report schedule," said Data Center Director Douglas Frechtling.

"We need their comments so we can judge whether to make this change."

The National Travel Survey, the Travel Outlook Forum, and the annual state economic impact estimates received the highest council ratings. But the council called for more timely release of these and other reports.

Moreover, the council suggested changing the name of the monthly newsletter, Travel Printout, to give it a more up-to-date image.

Comments from Data Center members and others about the proposed changes should be directed to Ida Simmons, manager of communications, US Travel Data Center, 1899 L Street, N.W., Washington, D.C. 20036 or call 202/293-1040. ##

Travel Prices Rise in September

A September jump in gasoline prices contributed to a 0.2 percent increase in travel prices according to the Travel Price Index (TPI) compiled monthly by TIA'S research affiliate, the US Travel Data Center.

For comparison, overall consumer goods and services costs, as measured by the Consumer Price Index (CPI), rose 0.5 percent in September.

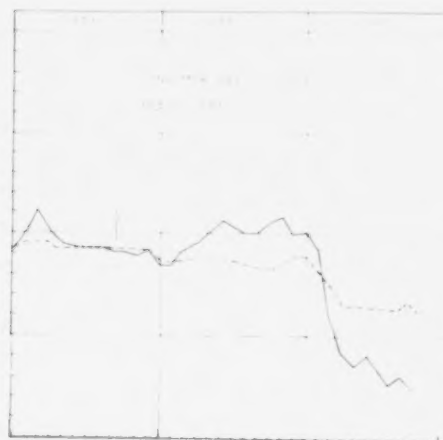
The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, climbed to 380.8 (1967=100) in September.

Gasoline prices advanced 2.2 percent in September, following a 5.2 percent decline the previous month. The cost of incidentals rose 1.0 percent while the cost of entertainment services gained 0.7 percent.

Lodging prices fell 1.0 percent in September, more than any other TPI component. Intercity bus and train

fares declined 0.7 and 0.4 percent respectively.

Travel prices are still 1.8 percent lower than they were twelve months ago, stemming from a 28.2 percent plunge in gasoline prices. This compares to a 1.8 percent increase in the CPI since September 1985. ##



Falling Gasoline Prices Dampen Travel Price Index

Monthly and Annual Rates of Change in the Travel Price Index and Components September 1986

TPI Component	Monthly Percent Change	Annual Percent Change
	August 1986 to September 1986	September 1985 to September 1986
Transportation	0.8	-9.9
Airline Fares	0.2	2.9
Intercity Bus Fares	- 0.7	9.0
Intercity Train Fares	- 0.4	7.3
Taxicab Fares	0.1	3.2
Gasoline	2.2	-28.2
Lodging	- 1.0	3.5
Food Away From Home	0.4	3.8
Entertainment Services	0.7	5.8
Incidentals	1.0	1.2
TRAVEL PRICE INDEX	0.2	- 1.8
CONSUMER PRICE INDEX	0.5	1.8

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

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Federal Government Revises Classifications of Travel Industry Businesses

After reviewing recommendations by the US Travel Data Center, Travel Industry Association of America, and other industry organizations, the U.S. Office of Management and Budget (OMB) revised the Standard Industrial Classification (SIC) system governing collection and analysis of information about the travel industry.

The new revisions will yield separate information about certificated and non-certificated air carriers, travel agencies, tour operators, passenger travel by water, car rental, and recreational vehicle dealers.

Data Center Director Doug Frechtling cautioned that these changes are but the first step to more comprehensive coverage of the travel industry in Federal data collection programs. The next step is actual collection of information on these new categories.

The Data Center has sent recommendations to the U.S. Bureau of the Census on additional data collection projects to cover the new industry categories as well as other, under-researched sectors.

The complete set of SIC revisions

will be published early next spring in Standard Industrial Classification Manual 1987 by the National Technical Information Service, 5285 Port Royal Road, Springfield, Virginia 22161. Orders for publication PB 867-100-012 received by December 31, 1986, will cost \$24; in 1987, the cost rises to \$30.##

Second Quarter Travel Falls Slightly in 1986

Travel in second quarter 1986 fell less than one percent from levels recorded one year earlier according to US Travel Data Center's 1986 National Travel Survey Second Quarter Report which will be released in December 1986.

The monthly telephone survey reported Americans took 284 million person-trips in April, May and June. (A person-trip is measured when anyone goes 100 miles or more away from home.)

The 1986 National Travel Survey Second Quarter Report is being sent to Data Center members and is available to others for \$75 prepaid from the US Travel Data Center, 1899 L Street, NW, Suite 610, Washington, DC 20036.##

Visitor Volume at National Parks

Region	AUG 1986 visits*	Change from AUG 1985 (percent)	Percent change 1986/1985 Year-to-Date
NEW ENGLAND	2,289,879	-2.8	0.6
MIDDLE ATLANTIC	4,605,134	19.0	13.6
SOUTH EAST	15,893,803	7.7	7.8
EAST NORTH CENTRAL	968,150	3.7	-1.8
WEST NORTH CENTRAL	2,025,303	10.1	3.6
WEST SOUTH CENTRAL	1,133,163	-5.5	3.2
MOUNTAIN	6,313,524	7.4	8.5
PACIFIC	7,529,773	23.9	14.2
TOTAL	40,758,729	10.4	8.6

* adjusted for differences in reporting units

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States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

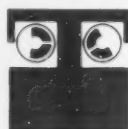
CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change		
			From Previous Month	From Year-ago Month	Year-to-date 1986/85
<u>Establishment receipts or retail sales</u>					
Hotels, motels and other lodging places(1)	Aug	\$ 3,936 million	0.6	5.1	6.1
Eating and drinking places(2)	Aug	\$11,935 million	1.1	9.6	7.0
Gasoline service stations(2)	Aug	6,802 million	-2.1	-20.0	-11.5
<u>Commercial lodging demand</u>					
Hotel/motel occupancy rate(3)	Aug	66.1 percent	-0.7	1.6	0.6
Real demand for commercial lodging(4)	Aug	59.7 million	3.3	8.0	3.9
<u>Airline passenger traffic(5)</u>					
Domestic revenue passenger-miles	Aug	25.3 billion	7.0	17.3	12.9
International revenue passenger-miles	Aug	7.3 billion	11.7	0.2	-9.5
<u>Highway traffic volume(6)</u>					
Rural arterial vehicle-miles	Aug	47.6 billion	2.8	5.5	5.7
<u>Rail passenger traffic(7)</u>					
Amtrak passenger-miles	Aug	542.6 million	2.1	-3.1	0.5
<u>Travel Price Index(8)</u>					
	Aug	380.1	-1	-2.1	0.4
<u>U.S. resident travel(9)</u>					
Total person-trips	Jul	137.8 million	21.8	2.9	2.4
Vacation person-trips	Jul	95.5 million	18.2	9.9	0.7
Total person-nights	Jul	826.8 million	32.9	2.9	0.8
Vacation person-nights	Jul	630.3 million	27.9	11.6	2.5
<u>Public use of national parks(10)</u>					
Visits	Aug	41,035,656	-5.3	7.0	6.8
Overnight stays	Aug	3,334,008	6.3	3.7	0.6
<u>Foreign arrivals in U.S.(11)</u>					
From overseas	Aug	1,051,924	-3.3	23.5	15.7
From Canada	Aug	1,663,789	14.5	4.5	0.5
From Mexico	Aug	92,777	-13.6	-8.6	N/A
<u>U.S. citizen departures(11)</u>					
To overseas	Aug	1,431,312	-4.8	-5.1	-7.0
To Canada	Aug	2,926,429	6.1	16.3	16.7
<u>Domestic demand for motor gasoline(12)</u>					
Barrels per day	Aug	7,434 thousand	-1.1	2.7	2.3

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Nettleton Research Center. (13) Preliminary; Source: U.S. Department of Energy.

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1987 Outlook for Travel and Tourism Predicts Sustained but Modest Growth

Travel demand grew in 1986 but failed to meet industry expectations, and 1987 will be another year of moderate growth, according to the U.S. Travel Data Center's 1987 Outlook for Travel and Tourism.

The 200-page report contains forecasts presented at the 1987 Travel Outlook Forum held in October in Miami Beach.

"Experts indicate that 1987 growth in travel away from home will pretty much duplicate the 1986 experience, with one or two exceptions," said Dr. Douglas C. Frechtling, Data Center director.

"Airline travel will grow more slowly, while arrivals from overseas will rise faster than any recent year. Business travel and long vacation trips should also prove good growth markets."

The report details the prospects for all major sectors of the industry:

- Don Wynegar, Director, Office of Research, U.S. Travel and Tourism Administration--Because the dollar has weakened, especially against European currencies, we can expect a visitor boom in 1987 from Europe;

- Peter Francese, Publisher, American Demographics Magazine--Those 55 years of age or older are going to grow in numbers as a proportion of the total population to the end of this century;

- Michael Durchin, Vice President, First Boston Corporation--Air Travel should grow 6 percent to 7 percent next year, not quite as fast as this year;

- Peter Mason. Travel classification

Manager, Better Homes and Gardens Magazine--Inter-regional travel patterns vary significantly by season.

The 1987 Outlook for Travel and Tourism, which contains the complete proceedings of the 1987 Travel Outlook Forum, including the only published seasonal trends in regional family vacation travel, is being sent to members of the US Travel Data Center and the Travel and Tourism Research Association, co-sponsor of the annual forum, and is available to others for \$85 (prepaid only) from the US Travel Data Center, 1899 L Street, N.W., Washington, D.C. 20036. **

Study Predicts Long Vacation Growth

Destinations with good air-links, quality accommodations and up-market package holidays geared to the expanding retired market will see a boom in long stay vacations in 1987, greater than any other sector of the U.S. domestic travel market, says a report in the November issue of Travel and Tourism Analyst, by Dr. Douglas Frechtling, director of the US Travel Data Center.

The report, "U.S. Domestic Holiday Travel," commissioned for Travel and Tourism Analyst, is the first detailed analysis of the U.S. domestic long vacation market (10 nights or more away from home).

"U.S. Domestic Travel" is in the November issue of Travel and Tourism Analyst which is \$68 per issue from the Economist Publications Ltd., 10 Rockefeller Plaza, New York, New York 10020. Call: Judy Cook 212/541-5730. **

Travel Prices Fall in October

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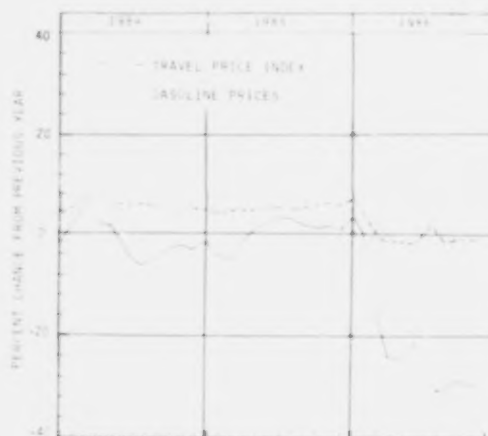
The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, dropped to 378.8 (1967=100) in October.

Gasoline prices plunged 3.1 percent in October, following a 2.2 percent increase the previous month. Lodging prices and intercity train fares followed, each declining 0.9 percent. Intercity bus fares fell 0.1 percent.

Travel prices remain below 1985 levels, a result of the 29.8 percent decline in gasoline prices since October

1985. The October TPI was 2.6 percent higher twelve months ago.

On the other hand, intercity bus fares have risen 8.1 percent in the past year, followed by a 6.2 percent rise in intercity train fares. The cost of entertainment services has increased 5.7 percent since October 1985.##



Falling Gasoline Prices Continue to Moderate Travel Price Index

Monthly and Annual Rates of Change in the Travel Price Index and Components October 1986

TPI Component	Monthly Percent Change	Annual Percent Change
	September 1986 to October 1986	October 1985 to October 1986
Transportation	- 1.0	-11.2
Airline Fares	0.1	1.5
Intercity Bus Fares	- 0.1	8.1
Intercity Train Fares	- 0.9	6.2
Taxicab Fares	0.1	3.3
Gasoline	- 3.1	-29.8
Lodging	- 0.9	2.3
Food Away From Home	0.2	3.9
Entertainment Services	0.6	5.7
Incidentals	0.4	1.0
TRAVEL PRICE INDEX	- 0.5	- 2.6
CONSUMER PRICE INDEX	0.1	1.5

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

September Travel Posts Increase

Travel during September increased 3 percent over last year's levels, according to the latest National Travel Survey, conducted by the US Travel Data Center.

Following a 5 percent increase in August, travel by Americans rose from 91.2 million person-trips in September 1985 to 98.2 million a year later. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that while pleasure travel rose less than 2 percent, business/convention travel bounced back a strong 18 percent from last month's 19 percent drop.

The average trip duration fell to 4.8 nights from 5.3 in the same month last year. Round-trip distance averaged

1,020 miles, substantially longer than the 950 miles recorded a year ago. **

News Briefs

The 1985-1986 Economic Review of Travel in America, originally scheduled for release in October 1986, has been derailed by the loss of several important computer files. The publication will be released in February 1987, retitled 1986 Economic Review of Travel in America and contain an evaluation of the industry's performance in 1986.

The U.S. Travel and Tourism Administration (USTTA) and the Travel and Tourism Research Association (TTRA) will inaugurate The Travel Review Conference on February 20, 1987, in Washington, D.C. Contact Mari Lou Wood, Executive Director, TTRA, University of Utah, P.O. Box 8066, Foothill Station, Salt Lake City, Utah 84108.

On February 18, 1987, the Travel and Tourism Government Affairs Council will sponsor the fifth annual Travel and Tourism Unity Dinner. Individual tickets are \$250 or 10 for \$2,000. Contact Shari Druckman, Travel and Tourism Government Affairs Council, 1899 L Street, N.W., Washington, D.C. 20036. **

Somerset Waters, author of the annual Travel Industry World Yearbook and a founding trustee of the Data Center, was named "Man of the Year in Travel Research" by the Student Chapter of the Travel and Tourism Research Association, New School for Social Research. The award was presented by the school's Dean of the Graduate School of Business and Urban Professions on December 8. **

Visitor Volume at National Parks

Region	SEP 1986 visits*	Change from SEP 1985 (percent)	Percent change 1986/1985 Year-to-Date
NEW ENGLAND	1,593,964	4.2	1.9
MIDDLE ATLANTIC	2,702,989	23.6	14.9
SOUTH EAST	11,588,374	-5.2	5.5
EAST NORTH CENTRAL	478,241	-5.6	-2.1
WEST NORTH CENTRAL	508,891	1.1	3.1
WEST SOUTH CENTRAL	698,826	4.5	3.3
MOUNTAIN	3,781,119	4.0	8.1
PACIFIC	34,986,620	6.0	13.5
TOTAL	56,339,024	3.8	7.6

* adjusted for differences in reporting units

The U.S. Travel Data Center is an affiliate of the Travel Industry Association of America



States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

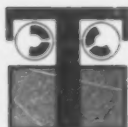
CURRENT TRAVEL INDICATORS

CURRENT TRAVEL INDICATORS			Percent Change		
	Current Month	Current Value	From Previous Month	From Year ago Month	Year to date 1986/85
<u>Establishment receipts or retail sales</u>					
Hotels, motels and other lodging places(1)	Sep	\$ 3,785 million	3.9	7.2	6.2
Eating and drinking places(2)	Sep	\$11,926 million	3	8.4	7.2
Gasoline service stations(2)	Sep	\$ 6,822 million	9	18.7	12.4
<u>Commercial lodging demand</u>					
Hotel/motel occupancy rate(3)	Sep	63.6 percent	3.8	0.9	0.7
Real demand for commercial lodging(4)	Sep	53.2 billion	10.9	4.3	4.0
<u>Airline passenger traffic(5)</u>					
Domestic revenue passenger-miles	Sep	22.9 billion	-9.5	40.0	15.6
International revenue passenger-miles	Sep	5.8 billion	20.5	6	9.0
<u>Highway traffic volume(6)</u>					
Rural arterial vehicle-miles	Sep	39.6 billion	16.8	5.1	5.6
<u>Rail passenger traffic(7)</u>					
Amtrak passenger-miles	Sep	375.5 million	30.8	5.9	1.0
<u>Travel Price Index(8)</u>					
	Sep	380.8	2	1.6	2
<u>U.S. resident travel(9)</u>					
Total person-trips	Aug	140.4 million	1.9	5.5	2.9
Vacation person-trips	Aug	108.4 million	13.5	4.1	1.5
Total person-nights	Aug	772.2 million	-6.6	-4.9	4
Vacation person-nights	Aug	650.4 million	3.2	-2.4	1.4
<u>Public use of national parks(10)</u>					
Visits	Sep	26,683,563	-35.0	1.3	5.8
Overnight stays	Sep	1,748,144	47.6	4.6	1.0
<u>Foreign arrivals in U.S.(11)</u>					
From overseas	Sep	805,949	23.4	23.9	16.6
From Canada	Sep	909,311	45.3	4.2	0.0
From Mexico	Sep	64,130	-30.9	7.1	8.4
<u>U.S. citizen departures(11)</u>					
To overseas	Sep	1,089,826	23.9	11.7	7.5
To Canada	Sep	1,503,245	48.6	31.0	18.2
<u>Domestic demand for motor gasoline(12)</u>					
Barrels per day	Sep	7,026 thousand	5.5	6.0	2.7

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary: adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary: U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) Preliminary: unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Nettleton Research Center. (13) Preliminary: Source: U.S. Department of Energy.

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Research News for the U.S. Travel Industry

January 1987

Volume 16, Number 1



Survey Reveals New Data on Business Travelers.

Travel Weekly and the US Travel Data Center today released a benchmark study of business travelers, concluding an exhaustive telephone survey of over 3,700 business travelers during 12 months ending August, 1986.

The 1985/86 Survey of Business Travelers, sponsored by Murdoch Magazines, which publishes Travel Weekly and Hotel and Travel Index, and conducted by the US Travel Data Center, is the most comprehensive and objective study ever published on business travelers.

"This study will be important to airlines, rental car companies, hotels and travel agents," said Bill Niles, research director of Murdoch Magazines. "For the first time, we have extensive data on business travelers who use these services."

The report examines in detail convention travelers, business travelers of various occupations, and other important segments of the business travel market.

According to the survey, 33 million U.S. adults take one or more business trips in a year and produce 141 million trips. About 10 percent of these travelers take 10 or more trips a year, accounting for one-half of all business trips. More than one-quarter of the trips are to attend conventions,

conferences or trade shows.

For information on custom tabulations of the survey data contact Suzanne Cook, 202/293-1040.

The 1985/86 Survey of Business Travelers is being sent to Data Center full members and is available to limited members and others for \$75 (prepaid) from the US Travel Data Center, 1899 L Street, N.W., Washington, D.C. 20036. **

U.S. Travel Data Center's Board of Trustees Elects Officers.

Rossi Ralenkotter, director of marketing/tourism for Las Vegas Convention/Visitors Authority, will serve as the US Travel Data Center's Board of Trustees chairman for 1987.

Ralenkotter, elected at the board's December meeting, has been a trustee since 1980 and served as treasurer in 1986. He replaces Robert E. Gall, vice president of Amtrak, who will return for another two year term as trustee.

William D. Toohey, as president of Travel Industry Association of America, serves as the board's permanent vice-chairman. The board re-elected Dr. Charles R. Goeldner, associate dean of the business schools of the University of Colorado, to serve as secretary, and Barbara Wickliffe, marketing research director of Best Western International, was elected treasurer.

Newly elected trustees are Amy Lang, National Market Manager of AT&T, and Jerry Foster, president of Saga International Holidays.

Max L. Madsen, consultant for Better Homes and Gardens; Laurie Jo Farr, vice president of tourism development, New York Convention and Visitors Bureau; and Bob LeBlanc, assistant secretary of the Louisiana Office of Tourism, were re-elected to the board of trustees. **

Summer Vacation Forecast.

The forecast of summer vacation travel in 1987 will be released at a press conference on May 13, 1987.

Full members of the Data Center will receive copies of the forecast as a benefit of membership.

Others may purchase the report for \$60 (prepaid) from the US Travel Data Center, 1899 L Street, N.W., Washington, D.C. 20036. **

Travel Prices Rise Slightly in November.

Declines in gasoline and lodging prices held travel costs to a modest 0.1 percent increase in November, according to the US Travel Data Center's Travel Price Index (TPI).

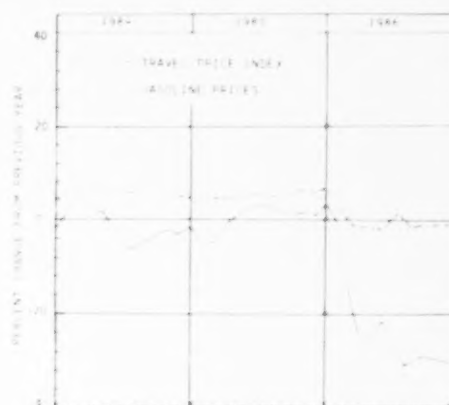
For comparison, overall consumer goods and services costs, as measured by the Consumer Price Index (CPI), also increased 0.1 percent.

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, climbed to 379.2 (1967=100) in November.

Gasoline prices, declining for the eighth time this year, fell 0.9 percent in November. Lodging prices dropped 0.7 percent, marking the third straight month this component has fallen. Intercity train fares and intercity bus fares decreased 1.0 and 0.4 percent, respectively. Taxicab fares were unchanged for the month.

The small gain in the November TPI has all but assured that 1986 travel prices will be lower than last year's for the year as a whole.

Over the past twelve months the TPI has fallen 2.4 percent. The primary factor was the 30.8 percent decline in gasoline prices since November 1985. ##



Declining Gasoline Prices Continue to Modify Travel Price Index

Monthly and Annual Rates of Change in the Travel Price Index and Components November 1986

<u>TPI Component</u>	<u>Monthly Percent Change October 1986 to November 1986</u>	<u>Annual Percent Change November 1985 to November 1986</u>
Transportation	0.5	-11.2
Airline Fares	1.4	2.4
Intercity Bus Fares	- 0.4	7.3
Intercity Train Fares	- 1.0	5.5
Taxicab Fares	0.0	2.4
Gasoline	- 0.9	-30.8
Lodging	- 0.7	3.0
Food Away From Home	0.5	4.1
Entertainment Services	0.3	5.5
Incidentals	0.2	1.2
 TRAVEL PRICE INDEX	 0.1	 - 2.4
CONSUMER PRICE INDEX	0.1	1.3

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by an affiliate of Travel Industry Association of America, the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, NW, Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director; Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for \$55 per year, U.S., Canada and Mexico; other foreign countries, \$65 per year, payable in U.S. funds only.

New Travel Handbook Emphasizes Research.

Travel, Tourism, and Hospitality edited by J.R. Brent Ritchie and Charles R. Goeldner, and sponsored by the Travel and Tourism Research Association (TTRA), is a research oriented handbook for the development of the tourist industry.

Douglas C. Frechtling, director, and Suzanne D. Cook, assistant director of the US Travel Data Center, who wrote the chapters "Assessing the Impact of Travel and Tourism" and "Research in State and Provincial Travel Offices," joined 44 other travel experts and researchers to produce the book's broad range of information.

The book, an introductory text for tourism research methodology, is an indispensable reference tool for managers in tourism, beginning researchers, and experienced researchers who need to review unfamiliar areas.

The first half of the handbook emphasizes the need for research at the national, regional, and municipal levels while the second half deals with research methodology.

Travel, Tourism and Hospitality Research is available for \$39.95 from John Wiley & Sons, Attn. order dept., 1 Wiley Drive, Somerset, New Jersey 08873. **



A Record Number of Americans Fly in 1986.

The Air Travel Survey conducted by the Gallup Organization during June, July and August, 1986, for the Air Transport Association of America, showed a record number of Americans, 72 percent, have ever flown on airlines and have averaged 3.2 round trips each.

The 1986 survey, obtained from 4,644 adults, reported that nearly one out of every three adults, or 31 percent flew during the past year.

Almost 54 percent of all air trips

within the last 12 months were for pleasure or personal reasons and included visiting friends or relatives, sightseeing and visiting resorts.

The incidence of having ever flown on a commercial airline is highest among those 30-64 years of age.

The 1986 Air Travel Survey is available for \$35 from Public Information Office, Air Transport Association, 1709 New York Avenue, NW, Washington, D.C. 20006-5206. **

Visitor Volume at National Parks

Region	OCT 1987 visits*	Change from OCT 1986 (percent)	Percent change 1987/1986 Year-to-Date
NEW ENGLAND	1,385,760	8.4	- .2
MIDDLE ATLANTIC	2,722,534	41.0	17.3
SOUTH EAST	11,223,910	-2.0	2.8
EAST NORTH CENTRAL	333,792	-16.2	-3.1
WEST NORTH CENTRAL	453,321	1.8	3.3
WEST SOUTH CENTRAL	610,100	-1.5	3.2
MOUNTAIN	2,486,206	18.4	8.9
PACIFIC	3,862,405	11.2	13.7
TOTAL	23,078,028	6.3	6.7

* adjusted for differences in reporting units

The U.S. Travel Data Center is an affiliate of the Travel Industry Association of America



States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

Current Travel Indicators

			Percent Change		
	Current Month	Current Value	From Previous Month	From Year-ago Month	Year-to-date 1986/85
<u>Establishment receipts or retail sales</u>					
Hotels, motels and other lodging places(1)	Oct	\$ 3,629 million	-4.1	4.3	6.0
Eating and drinking places(2)	Oct	\$12,068 million	1.2	8.9	7.4
Gasoline service stations(2)	Oct	\$ 8,421 million	23.4	0.2	11.1
<u>Commercial lodging demand</u>					
Hotel/motel occupancy rate(3)	Oct	62.1 percent	-2.4	1.3	0.6
Real demand for commercial lodging(4)	Oct	57.6 million	8.3	2.3	3.8
<u>Airline passenger traffic(5)</u>					
Domestic revenue passenger-miles	Sep	22.9 billion	9.5	40.0	15.6
International revenue passenger-miles	Sep	5.8 billion	-20.5	0.6	8.5
<u>Highway traffic volume(6)</u>					
Rural arterial vehicle-miles	Oct	40.0 billion	1.0	5.2	5.6
<u>Rail passenger traffic(7)</u>					
Amtrak passenger-miles	Oct	390.7 million	4.0	7.0	1.5
<u>Travel Price Index(8)</u>					
	Oct	378.7	-0.6	2.6	-0.1
<u>U.S. resident travel(9)</u>					
Total person-trips	Sep	98.2 million	-30.1	7.7	3.5
Vacation person-trips	Sep	63.3 million	41.6	2.8	1.6
Total person-nights	Sep	461.5 million	40.2	4.5	0.8
Vacation person-nights	Sep	310.2 million	52.3	8.3	0.4
<u>Public use of national parks(10)</u>					
Visits	Oct	23,078,028	13.5	5.8	5.8
Overnight stays	Oct	1,044,912	40.2	11.9	1.7
<u>Foreign arrivals in U.S.(11)</u>					
From overseas	Oct	717,309	11.0	22.5	17.2
From Canada	Oct	813,276	-10.6	2.8	0.2
From Mexico	Oct	57,529	10.3	-1.3	13.7
<u>U.S. citizen departures(12)</u>					
To overseas	Oct	984,354	-12.6	5.3	7.1
To Canada	Oct	897,605	40.3	12.4	17.9
<u>Domestic demand for motor gasoline(13)</u>					
Barrels per day	Oct	7,232 thousand	5.5	4.9	2.7

N/A = not available

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Nettleton Research Center. (13) Preliminary; Source: U.S. Department of Energy.

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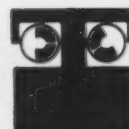
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Research News for the U.S. Travel Industry

February 1987

Volume 16, Number 2

1986/87 State Tourism Budgets Rise 11 Percent

State travel offices in 50 states plan to spend over \$234 million for travel and tourism development in 1986-87, according to the 1986-87 Survey of State Travel Offices released by the US Travel Data Center.

The survey reports tourism development budgets for the 50 states rose 11 percent over the 1985-86 budget total of \$212 million, which represented an 11 percent increase over 1984-85.

Illinois will have the largest budget for the third consecutive year, allocating \$15,500,000 for travel development, followed by New York, with \$14,836,100.

Thirty-one states posted budget increases for the current year. The average state travel development budget is \$4,683,405, 11 percent more than 1985-86's high of \$4,232,379.

STATES WITH LARGEST TRAVEL PROMOTION BUDGETS

Rank 1986-87	Budget	% Change from 1985-86
1. Illinois	\$15,500,000	8.0
2. New York	\$14,836,000	58.0
3. Pennsylvania	\$11,864,000	25.3
4. Michigan	\$11,800,000	0.0
5. Tennessee	\$10,824,000	1.9
6. Florida	\$10,814,000	13.9
7. Massachusetts	\$9,406,448	10.0

Mississippi posted the greatest cutback, decreasing spending by almost 22 percent, followed by Louisiana with a 12 percent decline.

The average state will devote almost \$2 million to advertising, or 42 percent of its total travel development budget, a 2 percentage point increase over last year's allocation.

The 1986-87 Survey of State Travel

Offices is being sent to Data Center members and is available to others for \$65 (prepaid) from the US Travel Data Center, 1899 L Street NW, Suite 610, Washington, D.C. 20036. **

Third Quarter 1986 Travel Gains Over Previous Year



Travel by US residents during the third quarter of 1986 grew 5 percent over levels recorded one year earlier, according to the US Travel Data Center's 1986 National Survey Third Quarter Report.

An average of 32 percent of all American adults, or 57 million residents, traveled away from home during each month of the third quarter of 1986.

The report, based on a monthly telephone survey, showed Americans took 376 million person-trips up from 358 million in 1985. (A person-trip is measured each time anyone travels 100 miles or more away from home.)

Travelers visiting friends and relatives stimulated the most overall growth, 8 percent, while business/convention travel and travel for sightseeing, entertainment, and outdoor recreation grew modestly.

Weekend travel increased significantly, rising 12 percent over 1985's level, while vacation travel increased 6 percent.

The average domestic round-trip distance of weekend travel increased by 120 miles, due largely to the greater use of air transportation by weekend travelers.

The 1986 National Travel Survey Third Quarter Report is being sent to Data Center members and is available to others for \$75 (prepaid) from the US Travel Data Center, 1899 L Street NW, Suite 610, Washington, D.C. 20036**

Gasoline Prices Produce First Travel Price Decline

Plummeting gasoline prices in 1986 produced the first annual decline in travel prices on record.

According to the Travel Price Index (TPI) compiled by the US Travel Data Center, travel prices fell 0.5 percent for all of 1986, the first drop in the 17-year history of the index.

For comparison, overall consumer goods and services costs, as measured by the Consumer Price Index (CPI), rose 1.9 percent in 1986.

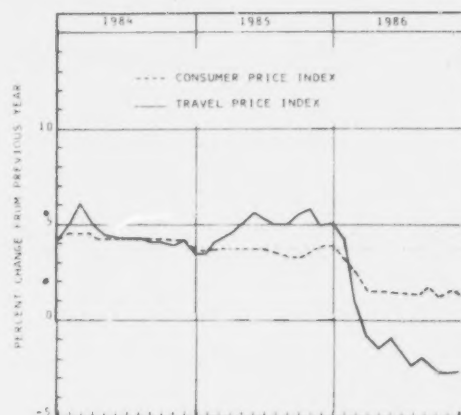
Gasoline prices fell 22.6 percent, the only TPI component to post a decrease during 1986. Intercity bus fares increased the most, 10.2 percent.

In December, the TPI fell 0.1 percent, marking the seventh monthly decline in 1986 travel prices. For comparison, the CPI rose 0.1 percent in December.

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by

Americans traveling away from home in the United States, dropped to 378.9 (1967=100) in December.

Travel prices are 1.5 percent lower than they were twelve months ago, the result of a 30.7 percent decline in gasoline prices.##



Travel Price Index Falls Far Below Consumer Price Index for 1986

Monthly and Annual Rates of Change in the Travel Price Index and Components December 1986

TPI Component	Monthly Percent Change	Annual Percent Change	Full Year Percent
	November 1986 to December 1986	December 1985 to December 1986	Change 1986/1985
Transportation	- 1.7	- 9.8	- 6.9
Airline Fares	2.6	5.3	4.1
Intercity Bus Fares	- 0.8	5.0	10.2
Intercity Train Fares	2.4	4.4	5.9
Taxicab Fares	0.7	2.5	3.1
Gasoline	0.4	-30.7	-22.6
Lodging	- 2.7	4.4	3.6
Food Away From Home	0.4	4.3	3.9
Entertainment Services	0.1	5.4	5.5
Incidentals	- 0.5	1.4	1.4
TRAVEL PRICE INDEX	- 0.1	- 1.5	- 0.5
CONSUMER PRICE INDEX	0.1	1.1	1.9

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

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November Leads Autumn Months' Travel Growth

Travel during November increased 4 percent over last year's levels, according to the latest National Travel Survey conducted by the US Travel Data Center.

Travel by Americans in October 1986 matched year-earlier totals of 89 million person-trips, then climbed to 95 million in November. (A person trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that while pleasure travel rose 15 percent in November 1986, business/convention travel dropped 7 percent, falling from 20 million person-trips a year ago to 19 million in 1986. This still represents a significant rise from the 1984 level of 15 million.

Vacation person-trips for November 1986 at 63 million, were up 5 percent over last year. This follows a 10 percent increase in October 1986 over year-earlier levels.

The average trip duration fell slightly to 4.5 nights while the average domestic roundtrip distance climbed from 910 miles to 950 miles in 1986.

Travelers choosing hotels/motels dropped 3 percent, but those staying with friends and relatives increased 9 percent.

Air travelers staying in hotels/motels increased 3 percent, but decreased their stay from 6.0 nights in 1985 to 5.4 nights in 1986.

Weekend travelers spending 4 nights or more increased dramatically over November 1985 levels.

September 1986 travel posted a 3 percent decrease from year-earlier levels, totaling 93 million person-trips for that month.##

Membership Survey Results Favor Data Center Services

At their annual meeting at the Fountainbleau Hotel in Miami, October 9, 1986, members of the US Travel Data Center answered a survey assessing the value of the center's services.

Members scored as most useful the National Travel Survey Full Year Report 1985, The Outlook for Travel and Tourism, Travel Printout, and "Traveltab 1986."

Survey results showed that Data Center services were more valuable to the travel industry as a whole than to individuals or organizations.

Survey respondents represented state travel offices, city bureaus, private industry firms, associations and educational groups.##

Visitor Volume at National Parks

Region	NOV 1986 visits*	Change from NOV 1985 (percent)	Percent change 1986/1985 Year-to-Date
NEW ENGLAND	555,133	3.8	2.3
MIDDLE ATLANTIC	1,712,272	39.3	17.9
SOUTH ATLANTIC	5,534,195	0.3	1.8
EAST SOUTH CENTRAL	941,750	14.8	6.7
EAST NORTH CENTRAL	183,365	33.8	-2.5
WEST NORTH CENTRAL	254,633	-.2	3.1
WEST SOUTH CENTRAL	497,890	9.6	3.4
MOUNTAIN	1,400,762	15.6	9.3
PACIFIC	2,940,080	21.0	13.8
TOTAL	14,020,080	11.3	6.9

* adjusted for differences in reporting units

The U.S. Travel Data Center is an affiliate of the Travel Industry Association of America



States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

Current Travel Indicators

Current Travel Indicators	Current Month	Current Value	Percent Change		
			From Previous Month	From Year-ago Month	Year-to-date 1986/85
<u>Establishment receipts or retail sales</u>					
Hotels, motels and other lodging places(1)	Nov	\$ 3,496 million	-3.7	4.5	5.9
Eating and drinking places(2)	Nov	\$12,182 million	0.9	9.5	7.6
Gasoline service stations(2)	Nov	\$ 6,937 million	1.6	-17.2	-13.4
<u>Commercial lodging demand</u>					
Hotel/motel occupancy rate(3)	Nov	62.4 percent	0.5	-0.5	0.6
Real demand for commercial lodging(4)	Nov	46.9 million	-15.1	2.8	3.7
<u>Airline passenger traffic(5)</u>					
Domestic revenue passenger-miles	Nov	22.6 billion	-5.4	14.5	11.5
International revenue passenger-miles	Nov	4.6 billion	-10.9	6.1	-3.1
<u>Highway traffic volume(6)</u>					
Rural arterial vehicle-miles	Nov	37.1 billion	-8.2	7.8	5.9
<u>Rail passenger traffic(7)</u>					
Amtrak passenger-miles	Nov	371.4 million	-4.9	-0.2	1.4
Travel Price Index(8)	Nov	379.2 million	0.1	-2.4	-0.3
<u>U.S. resident travel(9)</u>					
Total person-trips	Oct	86.5 million	-9.9	-0.3	3.1
Vacation person-trips	Oct	56.5 million	-7.6	9.6	2.3
Total person-nights	Oct	433.7 million	-6.0	-6.1	-1.3
Vacation person-nights	Oct	321.8 million	3.7	3.9	0.7
<u>Public use of national parks(10)</u>					
Visits	Nov	15,274,561	-33.6	12.8	6.2
Overnight stays	Nov	663,243	39.4	8.0	2.0
<u>Foreign arrivals in U.S.(11)</u>					
From overseas	Oct	717,309	-11.0	22.5	17.2
From Canada	Nov	653,309	-19.5	5.8	0.5
From Mexico	Oct	57,529	-10.3	-1.3	-13.7
<u>U.S. citizen departures(11)</u>					
To overseas	Nov	967,678	-6.6	3.0	-6.0
To Canada	Nov	517,887	-42.3	2.9	17.2
<u>Domestic demand for motor gasoline(12)</u>					
Barrels per day	Nov	6,903 thousand	-4.5	2.0	2.6

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary: adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary: U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) Preliminary: unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Mettleton Research Center. (13) Preliminary: Source: U.S. Department of Energy.

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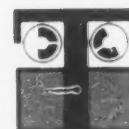
Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

THE U.S. TRAVEL DATA CENTER IS AN AFFILIATE OF THE TRAVEL INDUSTRY ASSOCIATION OF AMERICA



U. S.
Travel
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Research News for the U.S. Travel Industry

March 1987

Volume 16, Number 3

Seasons Bring Changes in Regional Travel

According to "Travel Trends," a quarterly newsletter recently inaugurated by Better Homes and Gardens Magazine to report findings of its on-going survey of the family vacation travel market, travel patterns differ not only from region to region, but from season to season.

Conducted by the US Travel Data Center, the Family Vacation Travel Survey analyzes the effects of seasonality on the family vacation travel market in the nine census regions of the United States. (States comprising each region are listed at the bottom of page 3.)

Comparing 1986 data on summer and fall family vacation travelers reveals many regional distinctions, including the following:

- Region with highest proportion of family vacation travelers aged 65+:
Summer-New England
Autumn-East North Central
- Region with highest proportion of family vacation travelers with \$40,000+ annual household income:
Summer-New England & West North Central
Autumn-Pacific
- Region with highest proportion of family vacation travelers using personal motor vehicle:
Summer-New England
Autumn-West North Central
- Region with highest proportion of family vacation travelers with education beyond bachelor's degree:
Summer-East North Central
Autumn-East South Central



"While Better Homes and Gardens wanted to learn more about the family vacation market, we also wanted to benefit the travel industry," said Peter Mason, travel classification manager of Better Homes and Gardens, "so we are making the survey results available, through 'Travel Trends,' to the industry free upon request."

"Travel Trends" is available free to sales and marketing departments of travel industry organizations. Write to Peter Mason, Travel Classification Manager, Better Homes and Gardens, 750 Third Avenue, New York, N.Y. 10017. **

Data Center Revises Travel Price Index

When the federal government, using recent consumer survey data, revised the Consumer Price Index (CPI) in January 1987, the US Travel Data Center accordingly revised the Travel Price Index (TPI) to reflect more current spending patterns of travelers in the United States.

The 1982-84 Consumer Expenditure Surveys, conducted by the U.S. Bureau of the Census, indicates that Americans now purchase most of the same goods and services while traveling in the U.S. that they purchased in 1972, when the last survey was conducted.

However, Americans now spend different proportions of their travel dollars to obtain these goods and services. The new proportion of travel dollars required establishing new "weights," which signify the relative importance of travel goods and services. (Continued on page 3)

January Travel Prices Rise



Rising motor fuel prices and a reweighting of travel prices led to a 2.3 percent increase in travel prices, according to the Travel Price Index (TPI) compiled by the US Travel Data Center.

Approximately 0.6 percent of the TPI's rise was directly attributable to the new weights and the revised method of computing the TPI.

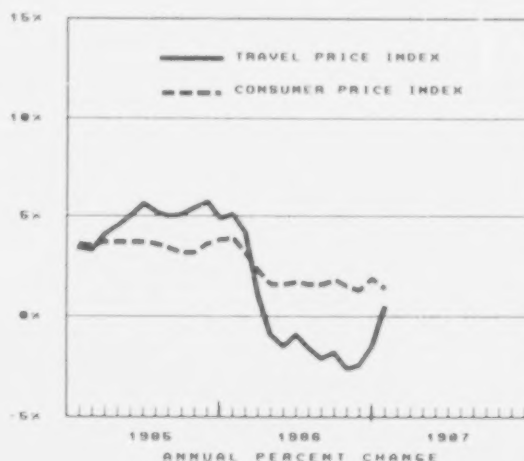
For comparison, overall consumer goods and services costs, as measured by the revised Consumer Price Index (CPI), rose 0.6 percent in January.

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, climbed to 387.6 (1967=100) in January.

Motor fuel led all advances with a 5.3 percent increase in January. Lodging prices followed, posting a 2.7 percent increase, while other intercity fares

rose 0.5 percent. Moreover, for the first time in 19 months, no TPI component registered a monthly decline.

The TPI has climbed 0.4 percent over the past twelve months. This modest rise is attributable to a 26.0 percent decline in fuel prices. ##



Monthly and Annual Rates of Change in the Travel Price Index and Components

January 1987

TPI Component	Monthly Percent Change	Annual Percent Change
	December 1986 to January 1987	January 1986 to January 1987
Transportation	3.1	12.5
Airline Fares	0.3	5.2
Other Intercity Fares	0.5	2.5
Intracity Public Trans.	0.3	4.1
Motor Fuel	5.3	-26.0
Lodging	2.7	6.1
Food and Beverages		
Away From Home	0.4	4.4
Entertainment	0.4	4.8
TRAVEL PRICE INDEX	2.3	0.4
CONSUMER PRICE INDEX	0.6	1.4

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

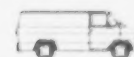
TRAVEL PRINTOUT is published monthly by an affiliate of Travel Industry Association of America, the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, NW, Washington, DC 20038. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for \$55 per year, U.S., Canada and Mexico; other foreign countries, \$85 per year, payable in U.S. funds only.

The U.S. Travel Data Center is an affiliate of the Travel Industry Association of America



Travel Price Index Revisions (Continued from page 1)



Using these weights, the Bureau of Labor Statistics selected the goods and services which would form components included in the CPI, combining some into a single component because they now consume less of the traveler's expenditures, dropping some, and adding goods and services on which the traveler now spends more.

Because the US Travel Data Center's TPI is based on the Bureau of Labor Statistics' CPI, changes in the CPI components are reflected in the TPI as well. The changes are as follows:

One item in the former TPI, incidental purchases while on trips, was not included in the 1982-84 Consumer Expenditure Surveys; consequently, the current TPI will not take into account price changes of incidental purchases made by travelers.

Intercity train and bus fares are now grouped together with a new item, intercity ship fares, and are now called "Other Intercity Fares."

Gasoline is in the "Motor Fuel" category, which also includes diesel fuel.

Alcoholic beverage prices are now combined with the cost of food away from home to form "Food and Beverages away from Home." Taxicab fares and intracity

mass transit are now combined to form "Intracity Public Transportation," and "Entertainment" now includes admissions to events requiring tickets and fees charged for participating in sports such as golf or tennis.

Because these components' weights were based on 1982-84 expenditure data, they had to be adjusted to reflect price changes from June 1983 through December 1986.**

December Travel Posts Significant Increase

Travel in December rose 15 percent over December 1985 levels, according to the latest National Travel Survey findings by the US Travel Data Center.

The monthly telephone survey reported that U.S. residents took 95 million person-trips during December, up from 82 million a year earlier. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

December's results brought the total number of person-trips for all of 1986 to 1.121 million, up from 1.078 million in 1985.

Auto/truck/RV travel increased 22 percent over December 1985, and air travel rose a modest 4 percent. **

Visitor Volume at National Parks

Region	DEC 1986 Visits*	Change from DEC 1985 (percent)	Percent change 1986/1985 Year to Date
NEW ENGLAND	265,315	3.7	2.2
MIDDLE ATLANTIC	1,228,259	51.9	19.3
SOUTH EAST	5,314,135	-3.2	2.4
EAST NORTH CENTRAL	88,567	-40.7	-3.2
WEST NORTH CENTRAL	194,592	28.3	3.6
WEST SOUTH CENTRAL	383,448	8.0	3.4
MOUNTAIN	1,290,226	24.9	9.7
PACIFIC	2,365,860	5.4	13.8
TOTAL	11,130,402	6.0	6.9

* adjusted for differences in reporting units

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH ATLANTIC: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. EAST SOUTH CENTRAL: Alabama, Kentucky, Mississippi, Tennessee. EAST NORTH CENTRAL: Illinois, Indiana, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

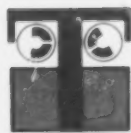
Current Travel Indicators

	Current Month	Current Value	Percent Change		
			From Previous Month	From Year-ago Month	Year-to-date 1986/85
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)	Dec	\$2,849 million	-20.9	10.4	9.7
Eating and drinking places(2)	Dec	\$12,509 million	3.0	13.3	8.0
Gasoline service stations(2)	Dec	\$ 6,814 million	-0.1	-19.5	-14.0
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Dec	48.4 percent	-22.4	1.5	0.7
Real demand for commercial lodging(4)	Dec	40.8 million	-16.5	4.9	3.8
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Dec	24.4 billion	7.0	6.7	10.6
International revenue passenger-miles	Dec	5.0 billion	9.1	5.4	2.5
Highway traffic volume(6)					
Rural arterial vehicle-miles	Dec	37.7 billion	1.6	8.0	6.2
Rail passenger traffic(7)					
Amtrak passenger-miles	Dec	447.7 million	20.5	5.2	0.8
Travel Price Index(8)					
	Dec	378.9 million	-0.1	-1.5	-0.4
U.S. resident travel(9)					
Total person trips	Nov	94.7 million	7.0	4.0	3.2
Vacation person trips	Nov	63.3 million	8.2	5.0	2.5
Total person nights	Nov	426.2 million	-1.7	-2.5	-1.4
Vacation person nights	Nov	329.2 million	2.3	-2.5	-0.5
Public use of national parks(10)					
Visits	Dec	11,375,778	25.5	5.3	6.1
Overnight stays	Dec	414,462	-34.5	23.2	2.4
Foreign arrivals in U.S.(11)					
From overseas	Nov	630,406	-12.1	21.4	17.5
From Canada	Dec	578,108	-11.9	0.4	0.5
From Mexico	Nov	53,850	-6.4	21.8	-11.7
U.S. citizen departures(12)					
To overseas	Nov	967,678	-6.6	3.0	-6.0
To Canada	Dec	516,191	-0.3	10.6	17.0
Domestic demand for motor gasoline(13)					
Barrels per day	Dec	7,077 thousand	3.1	4.2	2.7

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary, adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Nettleton Research Center. (13) Preliminary. Source: U.S. Department of Energy.

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Research News for the U.S. Travel Industry

April 1987

Volume 16, Number 4

Travel Industry Sales Continue to Rise



Travel industry sales in 1987 are projected to increase 8 percent according to the 1986-87 Economic Review of Travel In America, a report released by the US Travel Data Center.

While travel business receipts for air, bus and rail transportation; lodging; foodservice; and amusement and recreation services rose almost 7 percent in 1986, levels of jobs, income and business activity are still rising and should continue to boost business and leisure travel this year.

The report, widely accepted as a key reference to the travel industry, also calculates that domestic airline passenger travel will grow 8 percent, and personal motor vehicle travel will rise 3.3 percent in response to stable gasoline prices and improvements in the average fuel efficiency of the nation's automobile fleet.

Hotel and motel receipts are projected to rise at the same rate as 1986, 9 percent. If viewed as a single retail industry, according to the report, the travel and tourism sector is the third largest retail industry in business receipts (after automotive dealers and food stores), a position it has maintained since 1983, when auto sales continued on page 3)



Travelers spend \$269 Billion on US Trips

Residents of the U.S. and foreign visitors spent \$269 billion on traveling in America and its territories during 1986.

These preliminary estimates and other measures of travel's economic significance are contained in TravelTab 1987, a quick reference guide to current travel trends released by the US Travel Data Center.

Travel spending by residents and foreign visitors directly generated 5.2 million jobs in 1986, paying nearly \$58 billion in wage and salary income and producing \$34 billion in federal, state and local taxes, as well.

While Americans increased domestic travel spending 6 percent over the previous year, foreign visitors' expenditures in the U.S. grew nearly 9 percent in 1986.

TravelTab 1987 is a six-panel brochure on the volume and impact of travel to, from and within the U.S. It is available for \$4.00 prepaid from the US Travel Data Center, 1899 L Street, NW, Washington, DC 20036. ##

EMPLOYMENT GENERATED BY U.S. TRAVELERS
IN U.S. REGIONS, 1984 (thousands)



Percent of Total Jobs
0-4%
4-5%
over 5%

Source: U.S. Travel Data Center

Travel Prices Surge in February

Rising motor fuel prices led to a 0.8 percent increase in the February Travel Price Index (TPI) compiled by TIA's research affiliate, the U.S. Travel Data Center.

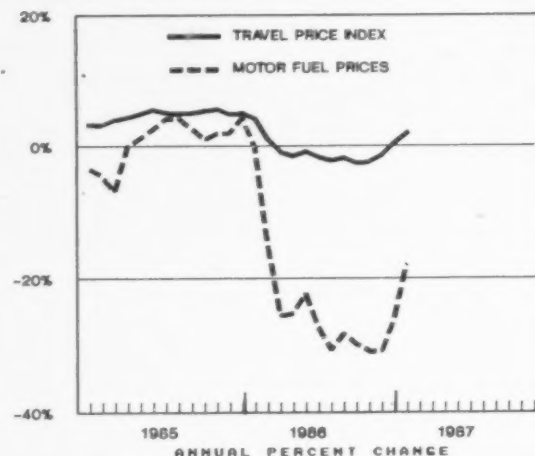
The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, climbed to 390.8 (1967=100) in February.

For comparison, overall consumer goods and services costs, as measured by the Consumer Price Index (CPI), rose 0.4 percent in February.

As in the previous month, motor fuel led all price advances with a 4.6 percent increase in February. Lodging prices followed with a 0.7 percent gain, while "other intercity transportation" (rail and bus fares) showed the only decline, 0.4 percent. The other components rose less than 0.5 percent for the month.

The TPI has risen 2.0 percent over the past twelve months, while the CPI has gained 2.1 percent. A 17.9 percent decrease in fuel prices is the main factor keeping travel costs down over the period.

Airline fares have led all other components with a 5.9 percent gain since February 1986.##



Monthly and Annual Rates of Change in the Travel Price Index and Components February 1987

TPI Component	Monthly Percent Change January 1987 to February 1987	Annual Percent Change February 1986 to February 1987
Transportation	2.6	-7.6
Airline Fares	0.3	5.9
Other Intercity Trans.	-0.4	2.1
Intracity Public Trans.	0.3	2.5
Motor Fuel	4.5	-17.9
Lodging	0.7	5.7
Food and Beverages		
Away From Home	0.3	4.3
Entertainment	0.4	4.8
TRAVEL PRICE INDEX	0.8	2.0
CONSUMER PRICE INDEX	0.4	2.1

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

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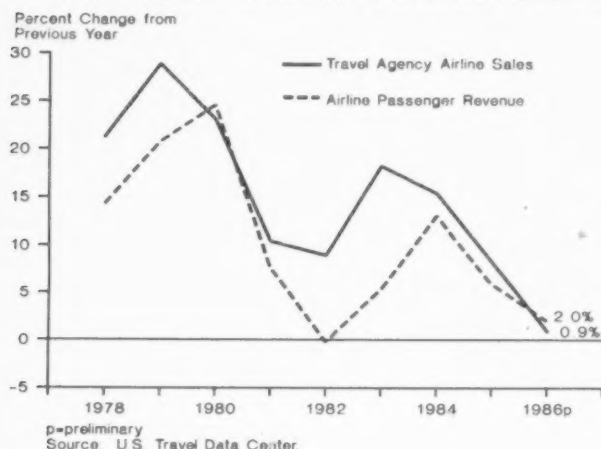
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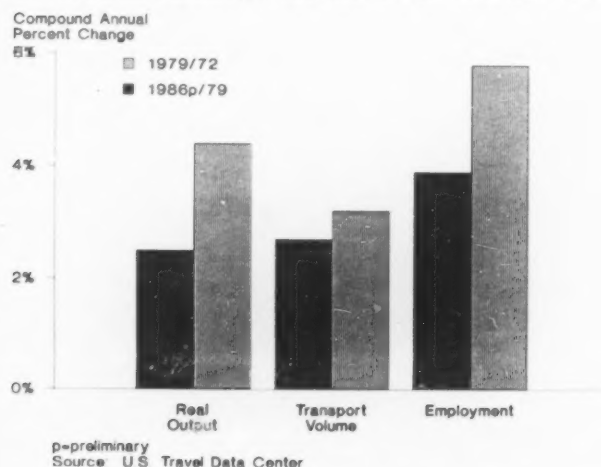
Travel Industry Sales (Continued from page 1)

pushed travel spending out of second place.

TRAVEL AGENCY SALES HAVE SLOWED RECENTLY



TRAVEL INDUSTRY GROWS MORE SLOWLY NOW



The report also estimates that the negative impact of the Tax Reform Act of 1986 on the travel industry is balanced by the positive effects, as increased consumer disposable income for spending on travel and other discretionary items mitigates the reduction in business travel and entertainment expenditures.

The 80-page report contains charts, tables and narrative on trends in travel and tourism and their impact on the U.S. economy from 1973 to the present, and includes chapters on international visitors and regional visitation patterns.

The 1986-87 Economic Review of Travel in America is available for \$48.00 prepaid from the US Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

US Travel Data Center Offers Free 1987 Program Guide

The US Travel Data Center offers a free 1987 Guide to Programs, Membership and Publications upon request. The 32-page guide details the Data Center's 1987 research program and describes publication and membership benefits.

The "1987 Program" section of the guide confirms the Data Center's intention to reschedule its quarterly National Travel Survey reports by year's end. Following the first and second quarter reports from the ongoing monthly telephone survey, the series will switch to seasonal reports beginning with a summer quarter National Travel Survey report (covering June, July and August 1987) to be released in the fall.

For a free 1987 Guide to Programs, Membership and Publications, address requests to the US Travel Data Center, 1899 L Street NW, Washington, D.C. 20036, or phone 202/293-1040.##

Travel Outlook Forum 1988 Focuses on the Changing Marketplace

Sandra Shaber, formerly of Chase Econometrics, will headline the 1988 Travel Outlook Forum program on October 27, 1987, at the Nugget in Reno.

The Travel Outlook Forum, co-sponsored by the Travel and Tourism Research Association, will focus on "Growth Opportunities in the Changing Marketplace." ##



Fourth Quarter 1986 Posts Increase in Travel

According to the 1986 National Travel Survey Fourth Quarter Report, prepared by the US Travel Data Center, Americans took 278 million person-trips, up from 262 million in fourth quarter 1985. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The report shows that vacation travel in October, November and December 1986 rose 8 percent.

Weekend travel increased faster than travel overall, gaining nearly 13 percent over 1985 levels.

Pleasure travel increased 10 percent during the fourth quarter 1986 due to a surge in "other pleasure" travel for sightseeing, outdoor recreation, and entertainment. Travel for these purposes grew by 23 percent, while travel to "visit friends and relatives," which

comprised 60 percent of all fourth quarter 1986 pleasure travel, rose just 3 percent.

The average domestic round-trip distance rose 70 miles to 990, while the average duration fell from 5.3 nights in 1985 to 4.7 nights in 1986.

The South Atlantic census region attracted the largest share of the fourth quarter's travelers, 24 percent, and also produced the highest proportion of travelers, 20 percent. The East North Central census region followed closely with 17 percent.

The 1986 National Travel Survey Fourth Quarter Report is available for \$75 prepaid from the US Travel Data Center, 1899 L Street, NW Washington, D.C. 20036.**

Hospitality in Transition Evaluates Future for Hoteliers

Hospitality in Transition by Albert J. Gomes, senior principal of Pannell Kerr Forster, is a detailed account of the lodging industry's evolution and a chart for its future.

The report, published by the American Hotel and Motel Association (AH & MA), provides the lodging industry with a perspective on its relationship to economic factors. For example, the top 25 hotel chains control slightly more than 50 percent of the total number of 2.75 million hotel/motel rooms.

The report is an excellent historical resource as well as a model for evaluating the future and pinpointing the most likely factors affecting hoteliers.

Hospitality in Transition is available from the Publications Department, American Hotel & Motel Association, 888 Seventh Avenue, New York, New York, 10106, for \$35 each to American Hotel & Motel (AH & MA) members, \$45 each for non-members, plus \$5 for shipping/handling. New York residents add tax.**

Survey of Business Travelers Continues a Second Year



Widespread interest in the Travel Weekly / US Travel Data Center 1985/86 Survey of Business Travelers prompted Murdoch Magazines, which publishes Hotel Motel Index and Travel Weekly, to sponsor another survey of business travelers.

The second study, based on a telephone survey of 3,700 business travelers conducted by the Data Center over a twelve month period, will further explore business travel.

According to Bill Niles, research director for Murdoch Magazines, the first study "defined the size of the market, and the second will investigate reasons for travel, and how market segments select airlines, rental cars and lodgings."

The survey, to be released in the spring of 1988, will report information on a calendar year basis. Individual questions can be included in the survey by calling the assistant director, US Travel Data Center, 202-293-1040.**



Director Reviews Accomplishments of US Travel Data Center

Editor's Note: TRAVEL PRINTOUT (TP) interviewed former Data Center Director Dr. Douglas C. Frechtling on April 16, 1987, the eve of Frechtling's departure from the organization he had guided since its beginning.

TP: Many members of the industry have never thought of the US Travel Data Center without Doug Frechtling at the helm. How would you like to be remembered by that organization?

Frechtling: The Data Center was founded as a non-profit research organization in 1973 by the Travel Industry Association of America with contributions from the U.S. Travel and Tourism Administration (then called the U.S. Travel Service), and 29 state travel development offices. I would like to be remembered as helping establish the Data Center when I was a vice president of the Travel Industry Association, and directing the Data Center for its first fourteen years.

TP: What, in your opinion, are the Data Center's major achievements under your direction?

Frechtling: There are two unique accomplishments that should be remembered, the Travel Economic Impact Model and the National Travel Survey.

One, we created the world's first economic model to estimate the contribution of travel away from home in each state and county in this country. Initially, this project was funded by the Data Center itself; then, in 1975, the US Department of the Interior awarded us a contract which allowed us to pull all of the earlier work together into a working model.

Two, we have established the longest continuing survey of the American traveling public, the National Travel Survey. We started this monthly telephone survey in March of 1979 and are pleased that our researchers have been in the field every month since then.

These two programs have helped establish travel and the industry that serves it as a vital American lifestyle and economic activity.

TP: How long did you work on the Travel Economic Impact Model?

Frechtling: The model was about two years in the making, undergoing an extensive revision in 1977. Of course, we have revised and refined it since then. In all, the model cost about \$150,000 to complete. The Department of Interior contributed about \$35,000 of the cost.



DOUGLAS FRECHTLING PH.D.

Director of US Travel Data Center 1973-1987

TP: For years, you've had a mountain-top vista on the industry. From your perspective, where is the travel business going from here?

Frechtling: The results of my last report for the Data Center, the 1986-87 Economic Review of Travel in America indicate the industry growth rate is slowing down; it has become a mature industry. Fewer Americans now view travel as the superior use of their leisure time than they did a decade ago.

TP: What can the industry do to improve its marketing of travel?

Frechtling: The industry should have two additional ongoing studies, in my opinion.

(Continued on page 6)



US Travel Data Center Reviews Terminology for Statistical Reporting

Adopted by the Board of Trustees of the
U.S. Travel Data Center
December 13, 1985

1. "Travel Industry" - an inter-related amalgamation of those businesses and agencies which totally or in part provide all means of transport, goods, services, accommodations and other facilities for travel out of the home community for any purposes not related to local day-to-day activity.

2. "Travel"-The action and activities of international and domestic travelers (as defined below) taking trips to a place or places outside of their home communities for any purpose except daily commuting to and from work or attending school.

3. "Tourism"--synonymous with "travel."

4. "International Traveler"-any person visiting a country other than that in which he(he) has his (her) usual place of residence, for not more than one year, and whose main purpose of visit is other than following an occupation remunerated from within the country visited, staying at least 24 hours, but not more than one year, in the country visited and the purpose of whose trip can be classified under one of the following headings:

sport	health	study
pleasure	religion	business
recreation	shopping	commerce
holiday	vacation	meetings
convention /trade show		
visiting friends/relatives		

5. "International Excursionist"- travelers, as defined in 4 above, staying less than 24 hours in the country visited (including cruise passengers).

6. "International Tourist" - synonymous with "international traveler."

7. "Domestic Traveler" - any resident of the United States regardless of nationality who travels to a place 100 miles or more away from home within the U.S. or who stays away from home one or more nights in paid accommodations and who returns home within twelve months, except commuting to and from work or attending school. This includes trips that can be classified under one or more of the headings listed in definition 4.

8. "Domestic Excursionist"- any person who travels more than 25 miles away from home one way but less than 100 miles and returns home the same day for any purpose except commuting to and from work or attending school, including trips that can be classified under the purposes defined in 7 above.

Director (Continued from page 5)

First is an annual expenditure study. It would report the spending patterns of various segments of Americans traveling away from home as they purchase transportation, food, lodging and other goods and services. The last study is 10 years old.

Second is a monthly report of travelers' expenditures. These figures should be reported to the business press in the same way that other economic indicators are reported such as retail sales and manufacturing output. This would improve recognition of the travel industry in the U.S. economy.

The Data Center has been talking about the need for these two studies for some time; however, as we have discovered over the past 14 years, it is difficult to get funding for research that benefits the industry as a whole.

TP: You began your career in the federal government, then moved to the non-profit sector. What is next?

(Continued on page 7)

Travel Rises in January 1986

Travel during January 1987 increased 4 percent over last year's levels, according to the latest National Travel Survey conducted by the US Travel Data Center.

Director (Continued from page 6)

Frechtling: On April 20, I will become president of Guest Plus, a new club for upscale travelers. Guest Plus provides special services at more than 50 of the leading luxury hotels in this country, plus other travel benefits. The company is based in Washington at 1000 16th Street, N.W., Ste. 415, Washington, D.C. 20036. Phone 202/331-0708.

TP: Any regrets about leaving the Data Center?

Frechtling: The Data Center now has the best staff it has ever assembled, and I will always remember staff members first when I think of my years there. They are well-equipped to carry forward the work begun in 1973. **

Travel by Americans in January rose to almost 65 million person-trips, nearly 2 million more than were recorded in the same month of 1986. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that while pleasure travel gained 4 percent over January 1986 levels, business/convention travel jumped 19 percent.

Auto/truck/RV travel fell slightly and air travel rose 16 percent.

Trips in January 1987 averaged 980 domestic round-trip miles, and 4.5 nights, both less than a year ago.

The increase in the number of persons spending at least one night away from home, combined with more business and air travel, boosted hotel/motel use considerably, and travelers used the homes of friends and relatives less often than last year in January. **

The forecast of summer vacation travel in 1987 will be sent to full members on May 13, 1987 by the US Travel Data Center. **

Visitor Volume at National Parks

Region	JAN 1987 visits*	Change from JAN 1986 (percent)	Percent change 1987/1986 Year-to-Date
NEW ENGLAND	212,711	1.6	1.6
MIDDLE ATLANTIC	833,864	19.1	19.1
SOUTH ATLANTIC	2,844,300	-10.3	-10.3
EAST SOUTH CENTRAL	1,354,561	-2.1	-2.1
EAST NORTH CENTRAL	186,535	-27.5	-27.5
WEST NORTH CENTRAL	155,730	10.4	10.4
WEST SOUTH CENTRAL	393,752	-.2	-.2
MOUNTAIN	1,171,931	1.4	1.4
PACIFIC	2,678,830	2.2	2.2
TOTAL	9,832,214	-2.0	-2.0

* adjusted for differences in reporting units

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH ATLANTIC: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. EAST SOUTH CENTRAL: Alabama, Kentucky, Mississippi, Tennessee. EAST NORTH CENTRAL: Illinois, Indiana, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

Current Travel Indicators

Current Travel Indicators			Percent Change		
	Current Month	Current Value	From Previous Month	From Year-ago Month	Year-to-date 1986/85
<u>Establishment receipts or retail sales</u>					
Hotels, motels and other lodging places(1)	Jan	\$ 3,616 million	26.9	9.7	9.7
Eating and drinking places(2)	Jan	\$12,842 million	0.6	10.6	10.6
Gasoline service stations(2)	Jan	\$ 6,950 million	2.0	-16.9	-16.9
<u>Commercial lodging demand</u>					
Hotel/motel occupancy rate(3)	Jan	61.9 percent	-4.8	0.2	0.2
Real demand for commercial lodging(4)	Jan	45.6 million	11.6	4.7	4.7
<u>Airline passenger traffic(5)</u>					
Domestic revenue passenger-miles	Dec	24.4 billion	7.0	6.7	10.6
International revenue passenger-miles	Dec	5.0 billion	9.1	5.4	-2.5
<u>Highway traffic volume(6)</u>					
Rural arterial vehicle-miles	Jan	32.4 billion	-14.1	4.2	4.2
<u>Rail passenger traffic(7)</u>					
Amtrak passenger miles	Jan	358.7 million	-20.0	2.5	2.5
<u>Travel Price Index(8)</u>					
	Jan	387.6 million	2.3	0.4	0.4
<u>U.S. resident travel(9)</u>					
Total person-trips	Dec	94.8 million	0.1	15.0	4.1
Vacation person-trips	Dec	67.2 million	6.2	8.7	3.1
Total person-nights	Dec	455.0 million	6.8	-1.4	-1.4
Vacation person-nights	Dec	369.6 million	12.3	-3.5	0.1
<u>Public use of national parks(10)</u>					
Visits	Jan	10,154,008	-10.7	-11.0	-11.0
Overnight stays	Jan	436,996	5.4	8.7	8.7
<u>Foreign arrivals in U.S.(11)</u>					
From overseas	Jan	634,393	-14.7	15.9	15.9
From Canada	Jan	727,489	27.1	1.9	1.9
From Mexico	Jan	47,481	-41.7	-3.8	-3.8
<u>U.S. citizen departures(12)</u>					
To overseas	Dec	1,178,230	21.8	5.4	-3.6
To Canada	Jan	388,659	-24.6	9.6	9.6
<u>Domestic demand for motor gasoline(13)</u>					
Barrels per day	Jan	6,469 thousand	-8.6	-0.3	-0.3

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary: adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary: U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) Preliminary: unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Nettleton Research Center. (13) Preliminary: Source: U.S. Department of Energy.

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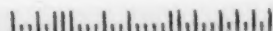
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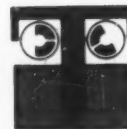


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THE U.S. TRAVEL DATA CENTER IS AN AFFILIATE OF THE TRAVEL INDUSTRY ASSOCIATION OF AMERICA



U.S.
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Research News for the U.S. Travel Industry

May 1987

Volume 16, Number 5



Data Center Forecasts Increase in Summer Travel

According to the 1987 Outlook for Summer Travel: A Guide To Vacation Markets, a report prepared by the US Travel Data Center, summer vacation trips will reach the highest level on record, 4 percent over last year.

The summer forecast is based upon interviews with more than 4,000 Americans gathered by the Data Center's monthly National Travel Survey, now in its ninth year.

The report predicts vacationers will take 297 million person-trips and spend almost 1.8 billion nights away from home in June, July and August 1987. (A person-trip is counted each time a person travels 100 miles or more away from home.)

The survey indicates that travel to cities will not be as heavy as last summer, while visits to small towns and rural areas will increase slightly. Yet, the most popular destination is ocean beaches with nearly one-third of vacation planners destined there.

The 1987 Outlook for Summer Travel projects 82 percent of summer vacationers will travel by car, truck or recreational vehicle, while 14 percent will go by air.

Among the regions, the states in the South Atlantic and East South Central census regions will generate the most summer vacation travelers and attract the most visitors. Residents of the western Mountain and Pacific regions will increase their summer travel by 9 percent this year, more than any other region.

Foreign destinations will attract 10.6 million American visitors this summer. Travel to Canada and Mexico will fall by 8 percent from last summer's levels, while overseas vacationers are expected to number 4.0 million.

"All signs point to record level vacation travel this summer. Continued growth in domestic travel, combined with a strong foreign visitor market, will both contribute to the health of the U.S. travel industry in the months to come," commented Suzanne Cook, director of the US Travel Data Center.

The complete forecast, 1987 Outlook for Summer Travel: A Guide to Vacation Markets, is free to Data Center full members and is available for \$60.00 pre-paid from the US Travel Data Center, 1899 L Street NW, Suite 610, Washington, D.C. 20036. ##



Suzanne D. Cook Appointed New Director of US Travel Data Center

The Board of Trustees of the US Travel Data Center recently voted to name Suzanne D. Cook the center's new director. She fills the spot vacated by Douglas C. Frechtling who resigned to become the Chief Operating Officer of Guest Plus, a new guest benefit program for patrons of smaller, luxury hotels.

A doctoral candidate in social psychology at the George Washington University, Washington, D.C., who is scheduled to receive her PhD degree later this year, Cook has served in a number of capacities during her 11 years at the Data Center.

Besides serving as assistant director for the past 5 years and project leader for the Data Center's National Travel Survey, she was responsible for the development of the Survey of Business Travelers, a benchmark study of the patterns of more than 3,700 U.S. business travelers. She was also instrumental in designing the computerized model that forecasts summer vacation travel for the Data Center. ##



Lodging Prices Lead Travel Price Index

According to the U.S. Travel Data Center, lodging for the first time in eight months led the increase in the Travel Price Index (TPI).

In March, the TPI rose 0.9 percent while overall consumer goods and services costs, as measured by the Consumer Price Index (CPI), increased 0.4 percent.

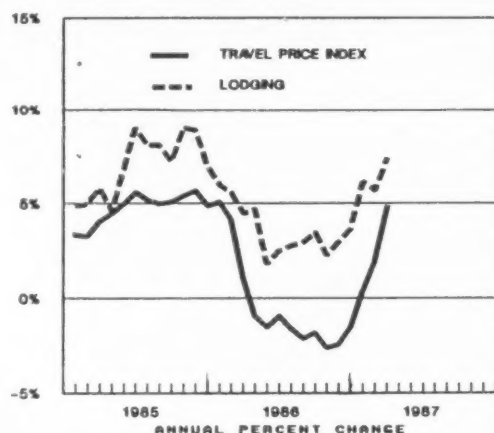
The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation, and other goods and services purchased by Americans traveling away from home in the United States, climbed to 394.4 (1967=100) in March.

Lodging prices led all advances with a 2.1 percent increase in March. Motor fuel, which had led travel price increases in January and February, followed with a 0.7 percent gain, while airline fares increased 0.5 percent.

The TPI has risen 4.8 percent over the past twelve months, and the CPI has gained 3.0 percent.

Lodging costs have led all components with a 7.4 percent growth since March 1986. Airline fares have shown the second largest increase, 7.3 percent.

Only motor fuel prices, which have declined 5.8 percent, were lower this year than March of 1986. The cost of transportation overall has fallen 0.3 percent in the annual comparison. ##



Monthly and Annual Rates of Change in the Travel Price Index and Components
March 1987



TPI Component	Monthly Percent Change	Annual Percent Change
	February 1987 to March 1987	March 1986 to March 1987
Transportation	0.6	-0.3
Airline Fares	0.5	7.3
Other Intercity Trans.	-0.3	1.0
Intracity Public Trans.	0.1	2.5
Motor Fuel	0.7	-5.8
Lodging	2.1	7.4
Food and Beverages		
Away From Home	0.3	4.3
Entertainment	-0.1	4.7
TRAVEL PRICE INDEX	0.9	4.8
CONSUMER PRICE INDEX	0.4	3.0

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

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TRAVEL PRINTOUT reports on Data Center Projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are \$55 per year, U.S., Canada and Mexico; other foreign countries, \$65 per year, payable in U.S. funds only.

The U.S. Travel Data Center is an affiliate of the Travel Industry Association of America



Travel Continues to Rise in February 1987

Travel during February increased 10 percent over last year's levels, according to the latest National Travel Survey conducted by the US Travel Data Center. Travel by Americans in February 1987 exceeded year-earlier totals of 49 million person-trips, and climbed to 54 million. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that while pleasure travel rose 9 percent in February, convention/business travel fell only slightly.

Vacation person-trips for February, 1987 were up considerably from last year, while weekend trips increased almost 10 percent over last year's levels.

The average trip duration fell from 5.0 in February 1986 to 4.4 in 1987, while the average domestic round-trip distance slipped from 1000 miles to 980 miles in February 1987.

Travelers using hotel/motels increased greatly over last year's levels, but travelers staying with friends and relatives remained at about the same level as February 1986.

Travel by auto/truck/RV increased 12 percent, while air person-trips decreased slightly from a year earlier. ##



Federal Aviation Administration Publishes Updated Guide

The Federal Aviation Administration has published Guide to Federal Aviation Administration Publications, an updated 60 page directory of agency publications which are available free of charge or on a sale basis.

In addition, the guide lists aviation related materials published by other federal agencies and also lists addresses and telephone numbers of all FAA regional and center offices and the 50 Federal Depository Libraries where most of these publications are on file.

Copies of the Guide to Federal Aviation Administration Publications FAA-APA-PG-9 are available from: Public Inquiry Center, Public Affairs Office, APA-230, Federal Aviation Administration 500 Independence S.W. Washington, D.C. 20591. A return address label will speed delivery. ##

Visitor Volume at National Parks

Region	FEB 1987 visits*	Change from FEB 1986 (percent)	Percent change 1987/1986 Year-to-Date
NEW ENGLAND	252,443	-7	2.0
MIDDLE ATLANTIC	989,495	52.8	35.3
SOUTH ATLANTIC	2,533,709	-13.9	-11.7
EAST SOUTH CENTRAL	1,185,374	-12.7	-4
EAST NORTH CENTRAL	208,755	-5.5	-17.6
WEST NORTH CENTRAL	176,251	27.5	18.8
WEST SOUTH CENTRAL	469,360	4.2	2.5
MOUNTAIN	1,372,779	12.1	6.2
PACIFIC	1,431,589	-41.8	-19.6
TOTAL	8,619,755	-11.1	-5.6

* adjusted for differences in reporting units

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH ATLANTIC: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. EAST SOUTH CENTRAL: Alabama, Kentucky, Mississippi, Tennessee. EAST NORTH CENTRAL: Illinois, Indiana, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

Current Travel Indicators

			Percent Change		
	Current Month	Current Value	From Previous Month	From Year-ago Month	Year-to-date 1986/85
<u>Establishment receipts or retail sales</u>					
Hotels, motels and other lodging places(1)	Feb	\$ 4,211 million	16.5	11.8	10.8
Eating and drinking places(2)	Feb	\$13,067 million	1.8	12.8	11.8
Gasoline service stations(2)	Feb	\$ 7,111 million	2.3	-11.6	-14.3
<u>Commercial lodging demand</u>					
Hotel/motel occupancy rate(3)	Feb	62.6 percent	1.1	0.1	0.2
Real demand for commercial lodging(4)	Feb	53.1 million	16.5	6.1	5.5
<u>Airline passenger traffic(5)</u>					
Domestic revenue passenger-miles	Feb	23.2 billion	4.4	13.6	12.3
International revenue passenger-miles	Feb	4.1 billion	-19.0	11.7	12.2
<u>Highway traffic volume(6)</u>					
Rural arterial vehicle-miles	Feb	31.4 billion	-2.6	7.8	5.6
<u>Rail passenger traffic(7)</u>					
Amtrak passenger-miles	Feb	300.9 million	-16.0	-3.7	-0.4
<u>Travel Price Index(8)</u>					
	Feb	390.8 million	0.8	2.0	1.2
<u>U.S. resident travel(9)</u>					
Total person-trips	Jan	65.5 million	-30.9	2.7	2.7
Vacation person-trips	Jan	36.9 million	-45.1	-3.9	-3.9
Total person-nights	Jan	294.8 million	-35.2	-11.2	-11.2
Vacation person-nights	Jan	199.3 million	-46.1	-20.2	-20.2
<u>Public use of national parks(10)</u>					
Visits	Feb	8,963,820	-11.7	-11.1	-11.0
Overnight stays	Feb	459,169	5.1	8.9	8.8
<u>Foreign arrivals in U.S.(11)</u>					
From overseas	Feb	609,701	-0.8	22.3	17.0
From Canada	Feb	663,720	-8.8	15.8	6.1
From Mexico	Feb	46,027	-3.1	-1.1	-2.5
<u>U.S. citizen departures(12)</u>					
To overseas	Jan	1,028,174	-20.5	3.6	3.6
To Canada	Feb	464,456	19.5	14.6	12.2
<u>Domestic demand for motor gasoline(13)</u>					
Barrels per day	Feb	6,638 thousand	2.6	3.1	1.4

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary, adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Hettleton Research Center. (13) Preliminary. Source: U.S. Department of Energy.

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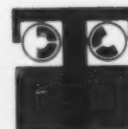
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U. S.
Travel
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Research News for the U.S. Travel Industry

June 1987

Volume 16, Number 6



Travel Industry Among Top Three Employers in 39 States

Fourteen states posted double-digit increases in travel receipts in 1985, according to the report Impact of Travel on State Economies, 1985, published by the US Travel Data Center, and no states' receipts declined.

The seventh study in this unique series shows travel spending in the U.S. generated \$30 billion in tax revenue for federal, state and local governments.

Top Six States in U.S. Domestic Travel Expenditures

State	1985 total U.S. Travel Expenditures (millions)	1984/85 Change (percent)
California	\$32,507	13.9%
Florida	18,642	5.4
New York	16,538	5.2
Texas	15,685	4.5
New Jersey	12,933	13.0
Pennsylvania	9,321	11.3

California garnered more U.S. traveler dollars than any other state, nearly \$33 billion, followed by Florida with \$19 billion and New York with \$17 billion. Rhode Island, with \$488 million in expenditures, received fewer travel dollars than any other state.

In fifteen states, jobs directly generated by travel spending exceeded those generated by any other private industry during 1985. The travel

industry was among the top three employers in 39 states.

The 58 page report, Impact of Travel on State Economies 1985, is the seventh annual study of travel's contribution to each state's employment, income and tax revenue, detailing changes in economic impact by state and major industry component. It is available for \$60.00 prepaid from the U.S. Travel Data Center, Two Lafayette Centre, 1133 21st Street NW, Washington, D.C. 20036. ##

Data Center, Industry Honor Douglas Frechtling

Friends and associates gathered at the Atlanta Marriott Marquis on May 10, 1987, during the 19th annual Discover America International POW WOW, for a re-



Presenting Gift from Data Center Staff to Doug Frechtling: Ida Simmons (left), Suzanne Cook (center).

ception honoring the former director of the US Travel Data Center, Douglas C. Frechtling, for his outstanding service to the travel industry.

Don Wynegar, director of the office of research for the US Travel and Tourism Administration, presented a framed certificate to Frechtling for his contributions to the U.S. tourism industry. William D. Toohey, president of the Travel Industry Association of America, (TIA) of which the Data Center is an (continued on page 3)



New Logo, New Address, Same Phone Number

The Data Center has a new logo and a new address: Two Lafayette Centre 1133 21st Street NW, Washington, D.C. 20036. The phone number is 202/293/1040.



Motor Fuel Price Increase Spurs Surge in Cost of Travel

The US Travel Data Center reported that for the third time this year, rising motor fuel prices led the increase in the Travel Price Index (TPI).

In April, the TPI rose 0.9 percent while overall consumer goods and services costs, as measured by the Consumer Price Index (CPI), increased 0.5 percent.

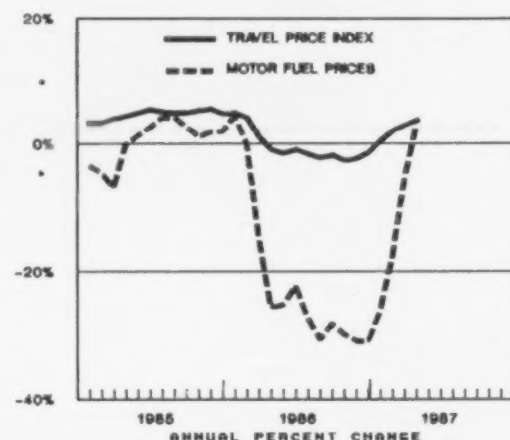
The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, reached 374.0 (1967=100) in April.

As in January and February, motor fuel prices led all increases with a 2.5 percent gain in April. Lodging prices, which led travel price increases in March, followed with a 1.9 percent gain, while entertainment prices increased 1.2 percent. Airline fares posted their first monthly decline since August 1986,

dropping 0.4 percent, and other intercity transportation (rail and bus fares) fell 0.1 percent.

Over the past twelve months, the TPI has risen 6.4 percent while the CPI has gained 3.8 percent.

Lodging prices have risen 7.3 percent since April 1986. **



Monthly and Annual Rates of Change in the Travel Price Index and Components

April 1987

TPI Component	Monthly Percent Change	Annual Percent Change
	March 1987 to April 1987	April 1986 to April 1987
Transportation	1.2	6.5
Airline Fares	-0.4	6.5
Other Intercity Trans.	-0.1	-0.1
Intracity Public Trans.	0.6	3.0
Motor Fuel	2.5	6.7
Lodging	1.9	7.3
Food and Beverages		
Away From Home	0.2	4.1
Entertainment	1.2	5.1
TRAVEL PRICE INDEX	0.9	6.4
CONSUMER PRICE INDEX	0.5	3.8

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of Travel Industry Association of America, 1899 L Street NW, Washington, D.C. 20036. Telephone: 202/293-1040. Suzanne D. Cook, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on Data Center Projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are \$55 per year, U.S., Canada and Mexico; other foreign countries, \$65 per year, payable in U.S. funds only.

The US Travel Data Center is an affiliate of the Travel Industry Association of America





March Travel Increases 6 Percent.

Travel during March increased 6 percent over last year's levels, according to the latest National Travel Survey conducted by the US Travel Data Center. Travel by Americans in March 1987 exceeded year-earlier totals of 70 million person-trips and climbed to 75 million. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that pleasure travel rose 5 percent in March, and convention/business travel increased considerably over year-earlier figures.

The hefty increase in the number of business travelers was not enough to affect the shift away from air transportation by pleasure travelers. Overall, the number of air passengers fell 2 percent, while auto/truck/RV travel increased 7 percent.

Vacation person-trips for March 1987 were down 14 percent during the month after rising sharply in February.

The business travel increase also boosted the average domestic distance traveled to 1,000 round-trip miles, up 90 miles from a year ago. The average number of nights away, however,

fell from 5.3 nights in March 1986 to 5.1 nights in March 1987.

Frechtling (Continued)

affiliate, presented Frechtling with a world globe. Toohey noted that Frechtling and the Data Center pioneered research that for the first time assessed the economic importance of U.S. tourism. "For this accomplishment, he has earned the gratitude of all who work for a wider understanding of this industry."

For the Travel and Tourism Research Association (TTRA), Rossi Ralenkotter presented Frechtling with a briefcase, recognizing his pioneering effort to measure the economic impact of travel on U.S. cities, counties and states.

Suzanne D. Cook, new director of the Data Center, and Ida Simmons, communications manager, gave Doug Frechtling an engraved pewter bowl and cups. Cook later commented, "It's no small task following in Dr. Frechtling's footsteps. I and the Data Center staff are committed to continuing the work he began 14 years ago." ##

Visitor Volume at National Parks	MAR 1987 visits	Change from MAR 1986* (percent)	Percent change 1987/1986* Year-to-Date
Region			
NEW ENGLAND	422,246	3	2
MIDDLE ATLANTIC	1,635,116	28	32
SOUTH ATLANTIC	5,651,926	-16	-14
EAST SOUTH CENTRAL	1,414,427	-24	-10
EAST NORTH CENTRAL	216,646	-4	-13
WEST NORTH CENTRAL	289,242	-7	5
WEST SOUTH CENTRAL	742,035	-10	-4
MOUNTAIN	1,696,038	-18	-5
PACIFIC	2,947,963	2	4
TOTAL	15,015,639	-9	-4

* Percent change figures may not be consistent with previously reported visitation totals due to National Park Service revisions.

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH ATLANTIC: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. EAST SOUTH CENTRAL: Alabama, Kentucky, Mississippi, Tennessee. EAST NORTH CENTRAL: Illinois, Indiana, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

CURRENT TRAVEL INDICATORS		Percent Change			
	Current Month	Current Value	From Previous Month	From Year-ago Month	Year-to-date 1986/85
<u>Establishment receipts or retail sales</u>					
Hotels, motels and other lodging places(1)	Mar	\$4,452 million	5.7	9.0	10.2
Eating and drinking places(2)	Mar	\$12,845 million	-2.3	9.6	11.3
Gasoline service stations(2)	Mar	\$ 7,240 million	2.0	-5.1	-11.4
<u>Commercial lodging demand</u>					
Hotel/motel occupancy rate(3)	Mar	60.6 percent	-3.2	-3.0	-0.1
Real demand for commercial lodging(4)	Mar	58.1 million	9.5	7.1	6.0
<u>Airline passenger traffic(5)</u>					
Domestic revenue passenger-miles	Mar	28.8 billion	24.3	12.8	12.5
International revenue passenger-miles	Mar	5.4 billion	30.4	12.9	12.4
<u>Highway traffic volume(6)</u>					
Rural arterial vehicle-miles	Mar	38.3 billion	21.2	2.6	4.6
<u>Rail passenger traffic(7)</u>					
Amtrak passenger-miles	Mar	367.4 million	22.1	-17.8	-4.4
<u>Travel Price Index(8)</u>					
	Mar	394.4 million	0.9	4.8	2.4
<u>U.S. resident travel(9)</u>					
Total person-trips	Feb	54.0 million	-17.6	10.0	5.8
Vacation person-trips	Feb	28.6 million	-22.5	23.3	6.3
Total person-nights	Feb	237.6 million	-19.4	-3.2	-7.8
Vacation person-nights	Feb	134.4 million	-32.6	-3.4	-14.2
<u>Public use of national parks(10)</u>					
Visits	Mar	15,015,639	74.2	-9.0	4.0
Overnight stays	Mar	685,734	58.4	5.0	7.0
<u>Foreign arrivals in U.S.(11)</u>					
From overseas	Feb	609,701	-0.8	22.3	17.0
From Canada	Mar	1,115,917	68.0	9.2	8.6
From Mexico	Feb	46,027	-3.1	-1.1	-2.5
<u>U.S. citizen departures(12)</u>					
To overseas	N/A	N/A	N/A	N/A	N/A
To Canada	Mar	596,541	9.0	-2.3	6.4
<u>Domestic demand for motor gasoline(13)</u>					
Barrels per day	Mar	6,921 thousand	2.9	-0.7	1.1

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Nettleton Research Center. (13) Preliminary; Source: U.S. Department of Energy.

**U.S.
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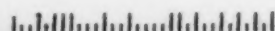
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TRAVEL PRINTOUT

June 1987

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Research News for the U.S. Travel Industry



TRAVEL PRINTOUT

THE U.S. TRAVEL DATA CENTER IS AN AFFILIATE OF THE TRAVEL INDUSTRY ASSOCIATION OF AMERICA



US
Travel
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Center



Research News for the U.S. Travel Industry

July 1987

Volume 16, Number 7



1986 Travel Reaches Record High Levels

Travel by Americans rose 4 percent in 1986, bringing travel to its highest levels in five years, the US Travel Data Center reported today.

Travelers' mileage within the U.S. rose 6 percent, while nights away from home slipped marginally from 1985 figures.

The 1986 increase is reflected in the 1986 National Travel Survey Full Year Report compiled by the US Travel Data Center.

The monthly telephone survey, which contacted 18,000 American adults last year and excluded trips less than 100 miles from home, showed that during the year, over 63 percent of all American adults took at least one trip of 100 miles or more totaling 1.12 billion person-trips for the year. (A person-trip is measured each time anyone goes 100 or more miles away from home.)

The average domestic round-trip distance was 990 miles, down from last year's 1,020 miles, while the average duration dropped slightly from 5.4 to 5.2 nights in 1986.

Automobile, truck, and recreational vehicle travel increased 4 percent over last year and accounted for three-fourths of the total travel market. Airlines carried 21 percent of all 1986 travelers.

Nearly 39 percent of all travel was for visiting friends and relatives, while travel for sightseeing, outdoor recreation, and entertainment made up 37 percent of all travel.

Business/convention travel comprised 17 percent of all 1986 travel and grew a modest 2 percent after a strong showing in 1985.

The substantial increase of 9 percent more weekend trips, which comprise 46 percent of all travel, boosted travel levels to a record high.

The most popular destination of Americans during 1986 was the South Atlantic census region, attracting 22 percent of all travelers. The East North Central census region produced the most travelers during the year, 19 percent.

The 1986 National Travel Survey Full Year Report is based on telephone interviews with 1500 American adults each month. It includes over 100 pages of tables, charts, analysis and comparisons with 1985, and is available for \$125 prepaid from the US Travel Data Center, Two Lafayette Centre 1133 21st Street NW, Washington, D.C. 20036.##

Ogilvy and Mather Publish 1987 Edition of Advertising Spending in the U.S.

Ogilvy and Mather's 1987 edition of Trends in Travel and Tourism Expenditures reports that travel advertising spending in the U.S. reached \$1,027 million in 1986.

Airlines (foreign and domestic), cruise lines, domestic destinations and foreign countries all recorded increases over 1985 expenditures. Only Canadian provinces' advertising spending dropped slightly in 1986.

For the second consecutive year U.S. states showed the most dramatic spending rise, 30 percent, bringing their expenditures in 1986 to almost \$67 million. U.S. flag carriers, with an increase of 8 percent in their 1986 expenditures, were still the top travel advertisers, with \$624 million in measured media expenditures for 1986.

Cruise lines, with a modest growth of 1 percent over 1985, were second in volume of advertising with \$127 million.

Foreign countries and foreign airlines both raised their advertising volume about one quarter percent over 1985. (Continued on page 3)



May Travel Prices Post Almost Imperceptible Increase

According to the US Travel Data Center's Travel Price Index (TPI), May's TPI rose 0.1 percent, the slowest rate since last December.

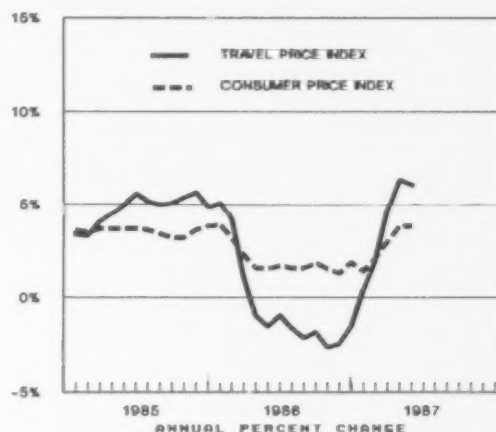
For comparison, overall consumer goods and services costs, measured by the Consumer Price Index (CPI), increased 0.3 percent in May.

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation, and other goods and services purchased by Americans traveling away from home in the U.S., reached 398.4 (1967=100) in May.

For the fourth time in 1987, motor fuel prices led all increases with a 0.8 percent gain in May. Airline fares dropped 0.5 percent following a 0.4 percent decrease in April.

Over the past twelve months, the TPI has risen 6.1 percent while the CPI has gained 3.8 percent.

Despite their recent decline, lodging prices have led all other components with an 8.0 percent rise since May 1986. Airline fares have shown the second largest increase, 5.4 percent. **



Monthly and Annual Rates of Change in the Travel Price Index and Components
May 1987

TPI Component	Monthly Percent Change	Annual Percent Change
	April 1987 to May 1987	May 1986 to May 1987
Transportation	0.3	5.0
Airline Fares	-0.5	5.4
Other Intercity Trans.	0.2	-0.5
Intracity Public Trans.	0.0	3.0
Motor Fuel	0.8	4.9
Lodging	*	8.0
Food and Beverages		
Away From Home	0.2	3.8
Entertainment	**	4.5
TRAVEL PRICE INDEX	0.1	6.1
CONSUMER PRICE INDEX	0.3	3.8

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

* Less than 0.05 percent decrease.

** Less than 0.05 percent increase.

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The US Travel Data Center is an affiliate of the Travel Industry Association of America





Travel Continues to Rise in April 1987

Travel during April increased just 1 percent over last year's levels, according to the latest National Travel Survey conducted by the US Travel Data Center.

Travel by Americans in April 1987 totaled 72 million person-trips (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that while pleasure travel declined 2 percent, convention/business travel increased 7 percent over year-earlier figures.

Compared to last year, 2 percent fewer U.S. residents traveled by air, but 4 percent more Americans used automobiles, trucks, and RVs to reach their destinations.

Although the number of business travelers staying in hotels and motels increased, pleasure travelers decreased, thereby reducing the total of overnight stays.

Vacation travel for April posted a gain of 3 percent. Weekend travel climbed a strong 9 percent.

The business travel increase boosted the average domestic round-trip distance to 1,000 miles, up from

870 miles in April 1986.

The average number of nights away from home remained unchanged at 4.3 nights.##

Advertising Spending (Continued from page 1)

This report, the latest in an annual series, covers 1982-1986 and details total advertising spending as well as comparing leading advertisers in each travel category.

Reports are \$55 per copy. Make checks payable to Ogilvy and Mather Inc. attention: Edward Berrol, 380 Madison Avenue, New York, New York 10017.##



Notes From the Center

The Data Center has three new staff members: Jody Caldwell, accountant; Lenore Reid, manager of survey research; and Kelly Repass, research assistant.

Repass is author of the Survey of State Travel-Related Tax Rates, a 20 page report available for \$20 a copy prepaid, from the US Travel Data Center, Two Lafayette Centre, 1133 21st Street NW, Washington, D.C. 20036. ##

Visitor Volume at National Parks

Region	APR 1987 visits	Change from APR 1986* (percent)	Percent change 1987/1986* Year-to-Date
NEW ENGLAND	826,194	8	6
MIDDLE ATLANTIC	2,263,083	39	35
SOUTH ATLANTIC	7,452,751	-18	-16
EAST SOUTH CENTRAL	2,014,126	-7	-9
EAST NORTH CENTRAL	341,124	4	-8
WEST NORTH CENTRAL	421,499	15	9
WEST SOUTH CENTRAL	934,986	-4	-4
MOUNTAIN	2,551,199	11	1
PACIFIC	4,094,217	24	10
TOTAL	20,899,179	0	-2

* Percent change figures may not be consistent with previously

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH ATLANTIC: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. EAST SOUTH CENTRAL: Alabama, Kentucky, Mississippi, Tennessee. EAST NORTH CENTRAL: Illinois, Indiana, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS			Percent Change		
	Current Month	Current Value	From Previous Month	From Year-ago Month	Year-to-date 1986/85
<u>Establishment receipts or retail sales</u>					
Hotels, motels and other lodging places(1)	Apr	\$4,262 million	-4.2	6.9	9.3
Eating and drinking places(2)	Apr	\$12,712 million	-0.3	7.0	10.2
Gasoline service stations(2)	Apr	\$ 7,527 million	1.9	6.2	-6.8
<u>Commercial lodging demand</u>					
Hotel/motel occupancy rate(3)	Apr	60.9 percent	0.5	-4.8	-0.2
Real demand for commercial lodging(4)	Apr	56.3 million	-3.1	3.4	5.3
<u>Airline passenger traffic(5)</u>					
Domestic revenue passenger-miles	Apr	27.7 billion	-3.8	26.2	15.9
International revenue passenger-miles	Apr	5.7 billion	4.9	32.6	17.4
<u>Highway traffic volume(6)</u>					
Rural arterial vehicle-miles	Apr	39.9 billion	4.0	6.6	5.2
<u>Rail passenger traffic(7)</u>					
Amtrak passenger-miles	Apr	394.7 million	7.4	4.5	-2.1
<u>Travel Price Index(8)</u>					
	Apr	397.9 million	0.9	6.4	3.4
<u>U.S. resident travel(9)</u>					
Total person-trips	Mar	74.7 million	38.3	6.3	6.0
Vacation person-trips	Mar	40.3 million	40.9	-14.1	-2.5
Total person-nights	Mar	381.0 million	60.4	2.3	-3.8
Vacation person-nights	Mar	270.4 million	103.9	-16.5	-15.3
<u>Public use of national parks(10)</u>					
Visits	Apr	20,899,179	39.2	0.0	-2.0
Overnight stays	Apr	920,933	29.4	8.8	7.7
<u>Foreign arrivals in U.S.(11)</u>					
From overseas	Mar	694,284	13.9	9.1	14.0
From Canada	Apr	1,052,429	-5.7	23.4	12.6
From Mexico	Mar	53,725	16.7	-29.4	-14.4
<u>U.S. citizen departures(12)</u>					
To overseas	Feb	1,021,377	-0.7	3.8	3.7
To Canada	Apr	662,100	30.7	17.9	9.9

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Nettleton Research Center. (13) Preliminary; Source: U.S. Department of Energy.

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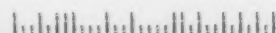
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Research News for the U.S. Travel Industry

August 1987

Volume 16, Number 8



1986 Travel Outlook Forum Highlights Growth Opportunities In the Changing Marketplace

Dr. Sandra Shaber, vice president of The Futures Group and frequently quoted authority on trends in consumer behavior, will headline the program of experts addressing the 1988 Travel Outlook Forum on October 27, 1987, at the Nugget in Reno.

Focusing on "Growth Opportunities in a Changing Marketplace," the thir-

teenth annual forum, sponsored by the US Travel Data Center, and co-sponsored by the Travel and Tourism Research Association (TTTRA), will be held in conjunction with TIA's National Conference, October 28 and 29, and for the first time will initiate the week's activities.

Shaber and other industry experts will premier their forecasts for 1988 and offer the earliest intelligence for directing marketing strategies. The national conference will feature practical application sessions for using the data provided at the forum.

(Continued on page 3)



Dr. Sandra Shaber, Headline Speaker at the 1988 Travel Outlook Forum

Shaber, whose overall responsibility at The Futures Group includes consumer marketing analysis and forecasting, will reveal current trends in consumer spending, saving and borrowing and analyze the impact of changing consumption patterns on travel in 1988. Shaber is a former vice president of Chase Econo-



First Quarter Travelers Log 6 Percent More Travel in 1987

U.S. residents logged 6 percent more travel in the first quarter of 1987 than they did for the same time period last year, according to survey findings soon to be released in the US Travel Data Center's 1987 National Travel Survey First Quarter Report.

Americans logged 194 million person-trips for the first quarter, with one-in-five travelers attending business meetings or conventions.

Both business/convention and pleasure travel posted healthy increases, 15 percent and 6 percent, respectively, while vacation travel dropped 2 percent compared to last year's first quarter figures.

Because weekend trips comprise one-half of all travel, their 16 percent rise over last year effectively lowered the average duration spent away from home from 5.2 nights to 4.7 nights.

The 1987 National Travel Survey First Quarter Report will be released in the fall of 1987. The report will be sent to Data Center members and others may obtain a copy by sending \$75 (pre-paid) to the US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C. ##



Travel Prices Rise Despite Falling Airline Prices

The US Travel Data Center reported today that although airline prices fell for the third consecutive month, the Travel Price Index (TPI) climbed almost a full percentage point in June.

June's TPI rose 0.9 percent from the previous month. For comparison, overall consumer goods and services costs, as measured by the Consumer Price Index (CPI), rose 0.4 percent in June.

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation, and other goods and services purchased by Americans traveling away from home in the United States, reached 401.8 (1967=100) in June.

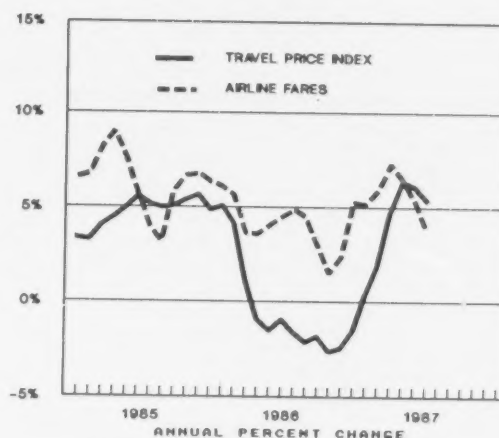
Airline prices, continuing the downward trend started in April, fell 0.8 percent in June.

Meanwhile, a 2.1 percent gain in motor fuel prices led all travel price increases in June. After falling in May, lodging prices rebounded to post the second largest gain, 1.8 percent.

Over the past twelve months, the TPI has risen 5.4 percent, while the CPI

has gained 3.7 percent.

Except for the 7.4 percent increase in lodging prices, travel price components have shown moderate increases since June 1986. Airline fares have posted the second highest rate, 3.9 percent. On the other hand, the other intercity transportation component has fallen 0.8 percent. ##



Monthly and Annual Rates of Change in the Travel Price Index and Components
June 1987

TPI Component	Monthly Percent Change	Annual Percent Change
	May 1987 to June 1987	June 1986 to June 1987
Transportation	0.9	2.9
Airline Fares	-0.8	3.9
Other Intercity Trans.	0.8	-0.8
Intracity Public Trans.	0.3	3.2
Motor Fuel	2.1	2.3
Lodging	1.8	7.4
Food and Beverages		
Away From Home	0.4	3.8
Entertainment	0.2	3.7
TRAVEL PRICE INDEX	0.9	5.4
CONSUMER PRICE INDEX	0.4	3.7

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

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The US Travel Data Center is an affiliate of the Travel Industry Association of America





Strong Growth in Pleasure Travel Spurs 6 Percent Increase In May



Travel rose 6 percent in May, 1987, over last year's levels because of strong growth in pleasure travel,

Travel Outlook Forum (continued)

Panels of industry experts will forecast trends for industry sectors in 1988 including air transportation, attractions and gaming, vacation travel, and accommodations.

This year marks the beginning of a special program of entertainment, sightseeing, visits to historic homes, and invitations to any of the conference's educational sessions, for spouses of Travel Industry National Conference and Travel Outlook Forum attendees. The cost is \$50 for the Oct. 27th program and \$150 for the entire three-day conference spouse program.

Registration fee for the forum is \$195 for Data Center, TTRA and TIA members, and \$220 for others. Registration for the 3-day conference and forum is \$395 for members, and \$425 for others.

For more information or to register for the 1988 Travel Outlook Forum or the entire conference, contact Ida Simmons, US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C. 20036, or call 202-293-1040.##

according to the latest National Travel Survey conducted by the US Travel Data Center.

The monthly telephone survey reported that travelers took 10 percent more person-trips than last May to visit friends and relatives, for sightseeing, entertainment, and outdoor recreation. (A person-trip is measured each time anyone goes 100 miles or more away from home.) Business/convention travel decreased 4 percent from 1986.

Vacation and weekend travel, increasing in popularity, posted gains of 7 percent and 9 percent, respectively.

The growth of pleasure travel boosted auto, truck and RV travel 8 percent, while air trips fell 4 percent on a person-trip basis.

Despite the increase in weekend travel, the average domestic distance climbed to 910 miles from 850 miles the previous year.

The average trip duration, 4.6 nights, was about the same in 1986. ##



Notes From the Center

The Data Center has a new research analyst, Lois Findlay, who replaces Terry Chelednik as information co-ordinator for the National Travel Survey. ##

Visitor Volume at National Parks

Region	MAY 1987 visits	Change from MAY 1986* (percent)	Percent change 1987/1986* Year-to-Date
NEW ENGLAND	1,335,050	6	7
MIDDLE ATLANTIC	3,737,297	28	32
SOUTH ATLANTIC	9,994,748	-8	-13
EAST SOUTH CENTRAL	1,916,665	-22	-21
EAST NORTH CENTRAL	546,782	12	-2
WEST NORTH CENTRAL	866,907	5	7
WEST SOUTH CENTRAL	1,227,500	1	-2
MOUNTAIN	3,895,603	8	3
PACIFIC	5,765,595	21	13
TOTAL	29,286,147	3	-1

* Percent change figures may not be consistent with previously reported visitation totals due to National Park Service revisions.

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH ATLANTIC: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. EAST SOUTH CENTRAL: Alabama, Kentucky, Mississippi, Tennessee. EAST NORTH CENTRAL: Illinois, Indiana, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

CURRENT TRAVEL INDICATORS			Percent Change		
	Current Month	Current Value	From Previous Month	From Year-ago Month	Year-to-date 1986/85
<u>Establishment receipts or retail sales</u>					
Hotels, motels and other lodging places(1)	May	\$ 4,255 million	-0.2	7.1	8.8
Eating and drinking places(2)	May	\$12,758 million	0.1	6.8	9.5
Gasoline service stations(2)	May	\$ 7,460 million	-0.5	3.1	-5.0
<u>Commercial lodging demand</u>					
Hotel/motel occupancy rate(3)	May	61.3 percent	0.7	-3.6	-2.2
Real demand for commercial lodging(4)	May	56.4 million	0.1	4.4	5.1
<u>Airline passenger traffic(5)</u>					
Domestic revenue passenger-miles	May	27.4 billion	-0.9	11.9	13.2
International revenue passenger-miles	May	6.5 billion	15.1	32.1	19.7
<u>Highway traffic volume(6)</u>					
Rural arterial vehicle-miles	May	42.1 billion	6.2	3.8	4.8
<u>Rail passenger traffic(7)</u>					
Amtrak passenger miles	May	439.3 million	11.3	8.7	0.2
<u>Travel Price Index(8)</u>					
	May	398.4 million	0.1	6.1	3.9
<u>U.S. resident travel(9)</u>					
Total person-trips	Apr	71.6 million	-4.1	1.3	4.7
Vacation person-trips	Apr	42.9 million	6.5	2.6	-1.1
Total person-nights	Apr	307.9 million	-19.2	1.3	-2.6
Vacation person-nights	Apr	214.5 million	-21.7	-1.3	-12.0
<u>Public use of national parks(10)</u>					
Visits	May	29,286,147	40.0	3.0	-1.0
Overnight stays	May	1,604,915	74.3	21.3	12.6
<u>Foreign arrivals in U.S.(11)</u>					
From overseas	Apr	795,264	14.5	36.2	19.7
From Canada	May	997,158	-5.3	22.1	14.5
From Mexico	Apr	88,253	64.3	66.2	4.6
<u>U.S. citizen departures(12)</u>					
To overseas	Mar	1,278,909	25.2	11.9	6.7
To Canada	May	1,157,581	74.8	-9.3	2.0
<u>Domestic demand for motor gasoline(13)</u>					
Barrels per day	May	7,472 thousand	2.1	6.8	2.7
N.A. = not available					

N.A. = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (12) Source: Statistics Canada and Nettleton Research Center. (13) Preliminary; Source: U.S. Department of Energy.

US
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